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ABSTRACT

An updated and expanded version of a 1976 monograph on alumni travel is presented. It provides practical information on all aspects of alumni travel, including the pros and cons of travel service programs for alumni, marketing and promoting tours, and legal and planning considerations. Along with basic, how-to articles, the handbook also features sample checklists, a sample tour director's handbook, a travel glossary, and a collection of frequently asked questions and their answers. The best of "CASE Currents" articles are also reprinted. Contents/authors include the following: "Designing the Tour" (Jack Maguire, Stephen L. Barrett); "Legal Considerations of Alumni Travel" (John Bisset); "The Care and Feeding of Tour Participants" (Frank B. Jones); "Marketing and Promoting Alumni Tours" (Stanley R. McAnally); "Brigham Young University Alumni Tour Director's Guidebook; "Travel Liability" (Earle Blackmon); "University of Michigan Alumni Travel--Our Smallest Success of 1975" (Harold M. Wilson); "Play the Airfare Game and Save Your Members Money" (Susan Mitchell Bistline); "Add More Education to Your Travel Program" (Stephen L. Barrett); and "Calling Adventurous Alumni to White Water, Black Sea" (Nancy Harper). (SW)

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Passport to Successful Alumni Travel Programs

Revised edition

Stephen Barrett, Editor

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CASE

Passport to Successful Alumni Travel Programs

Second Edition

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INTRODUCTION

The growth and popularity of travel as a service program for alumni resulted in a 1975 CASE Conference on Alumni Travel Programs. The enthusiasm of the travel conference faculty and the high quality of material generated for the conference coupled with CASE member interest have resulted in the publication of this monograph. The authors hope that this publication will help alumni administrators to start a travel program or improve existing activities.

This monograph is an update of the 1976 edition. The material covered here represents the best experience available at this time on alumni travel, but we cannot guarantee that every statement will be in force when you make use of it. Federal and state regulations governing travel change often. We urge you to consult with the legal counsel representing your individual association or institution and with reputable tour agents before you make major commitments.

CASE thanks all who participated in the publication of this monograph. Special recognition goes to Dick Wintermote (conference chairman), for his encouragement and follow-through, and to Steve Barrett, who accepted the challenge of editing raw data, recorded tapes, and hand-scratched notes.

WHY ALUMNI TRAVEL?

Dick Wintermote, Conference Chair
Frank B. Jones
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Harold M. Wilson
Steve Barrett, editor

Let's start with the question, "Why sponsor alumni travel programs?" Here are ten reasons. An alumni travel program:

1. Provides a continuing educational involvement with the institution.

Some alumni directors go so far as to state that continuing education is the best (at least one says it is the only) reason for an alumni tour program.

Among American adults, there is a growing demand for continuing education -- a demand for education that ranges from basic rudiments, to non-credit "how-to" courses, to bachelor of independent studies degree programs. The types of continuing education vary greatly, and a good travel activity can be a valuable addition to a well-rounded program. In some instances, it can be the basis for recruiting students for other continuing education offerings.

Since the earliest educational writing of Rousseau (and doubtless even before), travel has been looked upon as one of the finest types of education by experience. Colleges and universities that are providing education to the public are already in an advantageous position to use travel as another educational technique.

At most school, college, and university campuses are individuals who have a background of travel and the educational credentials to develop effective credit and non-credit travel study programs that are marketable to alumni constituencies. There also may be alumni with these talents. These resources, not readily available to the many commercial agents booking tours, enable the university alumni association to offer a unique educational travel experience and put the institution/alumni association in a noncompetitive position with the taxpaying travel business entities.

2. Identifies and makes possible the cultivation of prospective donors.

Although most alumni directors think that fund raising should never be the sole reason for alumni travel, it nevertheless does provide a great opportunity to identify and cultivate prospects.

Alumni directors with tour experience advise against making overt appeals for funds while on tour. Instead, they recommend that the alumni/development staff member assigned to the tour use every possible technique to become as closely acquainted as possible with the tour participants so that future fund raising can be facilitated.

Often research before the tour departs will assist in this identification and cultivation process. Take care, however, not to miss the less obvious prospect. One western university had a completely unknown alumnus sign up for a tour. He had dropped out of school and out of sight in the early 1920s. After the tour, he was so impressed with what he had learned that he entered into negotiations culminating with his endowment of the first academic chair at the university. Another university with an archaeological site in Greece had its tour visit the site. A tour participant later donated funds for a much-needed building.

3. Brings foreign alumni into contact with their college or university.

For most alumni administrators, there is virtually no other program that makes contact with foreign-based alumni. These alumni are often in income brackets and tax situations that make them potential high-level supporters of the institution.

Many university travel programs involve these alumni in the travel program. Foreign alumni may assist the tour operation by:

-- speaking to tour groups on areas of their expertise;
-- taking specialized tours through industrial plants, government offices, embassies, and so on;
-- inviting tour participants into their homes;
-- hosting social events;
-- arranging for special activities with local governments, private agencies, businesses, and the like.

Some alumni associations have sponsored formal events to which they invite all alumni, parents, friends, local media, and governmental officials of that location. This has proven to be beneficial for the local alumni and the tour participants.

Alumni directors who have used these techniques report that the foreign alumni are often flattered by the attention and are usually happy to participate.

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4. Develops positive relationships between tour participants.

   Frequently relationships between tour participants develop into lifelong friendships, business associations -- even marriages.

   When you include university officials in the tour, there is an opportunity for positive personal relationships to develop between the alumni officer who accompanies the tour and other university officials. Ideas for new programs and other changes that foster better alumni-university cooperation often result.

5. Identifies and makes possible cultivation of prospective volunteer workers.

   Many alumni associations now have volunteers serving as board members, presidents of local clubs and fund-raising chairpersons who got their first taste of alumni involvement from a well-operated tour program and follow-up activities.

   Good pre-tour planning, in-tour involvement, and post-tour activities can help to identify prospective volunteers and motivate alumni to become involved.

6. Stands on its own financially.

   Tour programs can be totally self-sufficient. In fact, some tour programs can make a financial contribution to the alumni budget. Well managed alumni tour programs should reimburse the alumni association budget for the time the alumni staff member puts into the assignment and for any out-of-pocket expenses. Some alumni associations charge back all staff time, equipment used, a portion of space rental charges, and so on. Take care to avoid non-related income problems with the Internal Revenue Service. Consult your accountant on this subject.

   Alumni tour directors need to use discretion to ensure that, by trying to cover all program-related costs, you are not pricing the tour out of the range of the participants. You also don't want to give the impression to potential participants that the travel program is another fund-raising technique.

7. Builds good will for the university among tour participants and non-participants.

   Usually you invite all alumni to join tours. Although only a small percentage end up actually going, all alumni become aware that the opportunity for travel is one of the benefits of alumni association membership. This can help alleviate the feeling of "all they ever do is hit me up for money." It can thus assist in building a positive image of the institution and the alumni association.

8. Provides fringe benefits for qualified staff members.

Assigning qualified staff members to help coordinate a tour enables several side benefits to accrue to the university alumni association and/or development office.

It enables you to reward good employees for their efforts. It helps keep the good employee on the staff. It assists the staff member to become more effective in his or her job, which not only helps the program but also gives the staff member a better image of his or her worth as a productive member of a team. It builds an attitude of professionalism among staff members as they strive to be creative in their job assignments. It provides more exposure for staff members to alumni, the university community, and the general public.

9. Makes sense for most institutions.

There are few arguments against an alumni travel program. If you have a small alumni body, tours may be harder to organize. But even small tours can bring the good results noted above.

10. Can be enjoyable to everyone involved.

DESIGNING THE TOUR

Jack Maguire, (formerly) University of Texas
Steve Barrett, Brigham Young University

A. THE MARKET FOR ALUMNI TRAVEL

1. Size of potential constituent market

Successful tours can be organized and carried out with as few as ten or 15 participants and we've heard of alumni tours that have included thousands of individuals.

Generally speaking, any organized alumni association has enough market potential to operate some kind of a tour program.

2. Demographics of potential market

Know the basics about your potential alumni market--age, geographical location, sex, approximate affluency, and so on. Also determine the travel desires of the group. To obtain this information you can:

a) Conduct an alumni association in-house records survey if you have this information on file;

b) Do a survey of alumni through a random sample questionnaire or other means.

For example, in a 1980 random sample of alumni from a large private western university, nine percent of respondents said they had participated in a university-sponsored tour. Respondents said they would like to visit (ranked in order of preference):

Location	% Interested
Eastern Mediterranean area	55
Eastern United States	54
Mexico/Latin America	48
Europe	39
South Seas	39
New Zealand/Australia	32
Scandinavia	27
Orient	25
Round the World	22
Africa	15

Here are some other findings:

Time of year to travel	% Interested
June/July/August	50
rest of the year	13

Length of tour	% Interested
2 weeks/less than 3 weeks	28
1 week/less than 2 weeks	23

Type of tour interested in	% Interested
Air/Sea Cruise	27
Family Camping	27
Trip to off-campus athletic event	18
Research expedition	14
Bus tour	9
River run	9
Survival trip	7
Backpacking trip	6

Size of tour group desired	% Interested
24 to 40 individuals	36
80 to 120 individuals	13
200 or more	2

3. The best market potential for tour participation

Although it is difficult to generalize with accuracy, our experience indicates you can use these guidelines with some degree of confidence:

a) Older alumni are in a better position regarding time and money to travel. We have found the best success with soliciting the 15th to 50th class year groups.
b) Young alumni enjoy tours designed as family experiences (more about this later in this chapter).
c) The parents of current students are good candidates for tours.
d) It helps to stratify the potential market as to possible income levels.
e) You may also be able to stratify your audience by such things as social club membership as students, donor level, occupation, and so on.

B. WHOM TO INVOLVE IN TOUR LEADERSHIP

1. Tour Agents

Much can be said about the importance of the tour agent you choose to set up your programs. We assume that you are not an expert in travel arrangements and that you will have to use an agent to assist you. Some alumni associations have had sufficient experience and deal in such numbers that they have developed considerable expertise. To one degree or another they depend less on the retail agent and go directly to wholesalers or even directly to suppliers of hotels or air service for some of their arrangements. This can save you money, but it does take a lot of time and experience.

There are many reputable travel firms that can do an excellent job for your association. We suggest you talk with your colleagues who have used travel agents to get an idea of how they have been treated.

Usually you can expect a travel agent to provide the following services for you:

- a) Assist in the development of an itinerary or even the general location if you don't have a preference.
- b) Make all arrangements for:
  - 1) transportation to the location (air/sea/etc.)
  - 2) local transportation (buses/train/donkey/etc.)
  - 3) schedules related to such travel
- c) Make hotel accommodation reservations
- d) Make local touring arrangements
- e) Pay bills
- f) Give an accurate accounting of funds expended
- g) Provide promotional material for tours
- h) Put up the "front money" to get the tour promotion started

Many agencies will provide more than these services, and some will be negotiable.

The tour agent will usually ask the alumni association to do at least the following:

- a) Provide academic leadership and arrange for lectures, classes, etc., if applicable.
- b) Provide list (mailing labels) of those to receive promotional material. In some cases you may also provide the mailing services for the tour program.

c) Provide arrangements for course credit, if offered.
d) Provide at least one staff member to direct the tour needs.

Again, there may be more things required of you by the individual agent. You'll need to work out responsibilities with your particular agent.

2. University officials

For the sake of long-term support of the program, we suggest that you involve university officials on some or all of your tours. Figure their cost into the price of the tour paid by the participant, if you must. Many positive results have come from the personal contacts that are developed on the tour. Also, tour participants are flattered to rub shoulders with the university president or vice president.

Use the university officials as guest lecturers or as the academic leader if applicable. This may give them an "excuse" to go and it will help the image and salability of the program in the eyes of the participants.

3. Alumni staff

A tour without an alumni staff member is often a waste of a good "point-making" opportunity. It is also courting disaster if things don't go well. It can also be a good "perk" for the deserving and capable employee.

The cost of a staff person is usually worked out and included in the fee paid by participants. Those who have gone on one or more tours find out that it is no vacation. The alumni staff person is usually responsible for all logistics and works closely with the travel agent and/or representative. The "weary factor" associated with this assignment, coupled with the actual work and responsibility involved, make this a major job task. In fact, you should write this kind of assignment into job descriptions so the IRS won't rule this as a "perk" on which an employee must pay income tax.

4. Academic staff

Most tours should have a strong academic flavor. This is usually done by inviting one or more professors to provide a series of lectures/classes/workshops as part of the tour offering. The cost of the professor(s) is usually figured into the fee paid by tour participants.

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Often you can sponsor a pre-tour lecture series as a promotional activity as well as a part of the tour offering. These can be taped and sold to those who cannot attend.

Be aware that some tours may not require an academic representative. For example, if you sponsor a trip to a bowl game you may not need a professor of political science on board.

5. Development staff

To maximize the potential benefit to the institution, we suggest that you invite a development officer to participate in the tour. Many positive contact opportunities are available for these staff members and much future work can be started on these trips. You can charge the cost as a fund-raising expense or have it budgeted into the fee paid by participants. We do not suggest that you use alumni travel programs as overt fund-raising functions, but that the contact be low key with good follow-up after the tour. Having said that, we are aware of one travel study tour that was used to raise over $3 million for a special study abroad center. This tour cost the individuals $100,000 each. It was a super deluxe tour that still resulted in significant net support for the project.

6. Volunteers

If a volunteer has enough expertise to serve as an alumni staff person, academic lecturer, or bus host, by all means use that person. Sometimes you may only have to offer him or her a discount on the cost of the tour. In return you have a loyal and helpful person who can add a lot to the success of the tour.

This is also a good activity for your successful fund campaign or membership chairman to be involved in. It's a nice way to say thanks for a job well done.

In all of this be aware of the precedent you are setting and make sure you can live with it down the road!

C. WHAT TO DO

The "what" of the tour design is, in reality, the heart of the whole program. What you do on the tour determines more than anything else the success you will have in selling the tour, the problems you will have on the tour, and the success you will have in reaching your desired goal.

We suggest you put together a specific mission statement of what you will accomplish by conducting, first of all, tours in general, and secondly, the specific tour that is being designed. Then organize the tour.

There are several variable factors that you need to consider. All of these have a direct impact on the success of the tour. The factors include:

1. Type of tour offered
2. Where you go
3. When you go
4. Cost of the trip
5. Who leads the tour
6. Length of the trip

1. Type of tour offered

First of all, alumni travel programs should provide a variety of good offerings to meet the interest, time constraints, pocketbook, and so on of your alumni constituency. For the sake of discussion, let's divide the alumni tour business into three general categories and discuss how you can use them.

a. The Alumni Travel/Study Tour. These tours are designed with a strong emphasis on the educational offering by qualified academic personnel. They can take many forms but are usually major tour offerings.

Advantages:

1. They provide the most positive public relations image and cultivational value for the institution and the alumni association of any kind of tour
2. Usually they are appealing to alumni
3. They are also appealing to faculty members who see themselves as possible participants
4. If well designed, they are easy to sell
5. They keep your tour program relatively free from "unrelated business" problems that are of interest to the Internal Revenue Service.
6. College credit may be made available for those who want or need it

Disadvantages:

1. They may be a bit more expensive than other tours
2. Because these tours are more complicated than other offerings, there is more work involved to organize them and carry them out.

Examples:

1. A museum tour of Europe
2. Art history tour of the Southwest
3. A Mediterranean cruise
4. A Mayan ruin tour
5. A literature tour of Scandinavia

b. The Alumni Expedition. These short-term travel programs are usually low cost and can be designed for families and/or young alumni. They combine a rich educational experience with many recreational activities.

Advantages:

1. They are relatively low in cost
2. They involve a small amount of time
3. The emphasis is on a fun learning experience for the entire family
4. The entire family can go for a reasonable price
5. They offer a chance to add variety to alumni tour offerings

Disadvantages:

1. They do not always appeal to the alumni with much time and money
2. They may not be large enough to be worth your time and effort

Examples:

1. A family camping caravan to Mexico. This kind of a program uses trailers, motor homes, tents, etc., that are owned by alumni. They make the trip relatively inexpensive and it's exciting to travel as a group.
2. A bus tour to a local music or dramatic festival
3. A bus tour of local historical sites
4. A river run tour

c. Alumni Support Travel. This is usually in conjunction with an athletic or other group that is traveling.

Advantages:

1. Alumni like the special treatment they receive in relation to traveling with a university group

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2. This program gives a visible degree of support for the traveling group
3. The trip is usually easy to sell because it has a purpose

Disadvantages:

1. It appeals to one type of alumni audience
2. It does not usually include an educational element

Examples:

1. Travel with a football/basketball team to a bowl game or NCAA finals
2. A special tour with the a cappella choir to Europe
3. A bus tour to a nearby town in support of an institutionally sponsored program

Most alumni tours will fall into one of these three categories, although you may choose to call them something different. The type of tour you design will, of course, be tailored to your own needs.

Tour agents will approach you with proposals of already structured tours, and this may determine the type of tour you offer. Usually these pre-packaged tours enable you to use a part of the tour package for your alumni. This means that you will take a specified number of places -- usually in increments of 15 up to the total places available.

These "packaged" tours have several advantages and disadvantages. You can usually get a pretty good price, although even here it pays to shop around. The basic arrangements are already made and usually run smoothly, especially if this is not the first time a firm has offered this package.

Some disadvantages are that you tend to lose your identity as an alumni group unless you work to avoid it. For example, you could be identified as "Bi-Western Tour #7" in all tour literature, announcement signs, marquee, and so on.

Also, if your group is mixed in with others for the packaged tour you have to follow that program schedule whether you want to or not. If you want to do something extra for your group alone (lecture, visit to alumnus home, etc.) you have to work it out with the rest of the group. On the other hand, if another group does something special for its members, then your group may feel slighted or left out.

The basic travel styles of tours may dictate where, when, and how you go. Briefly, they are:

a. Fly/Cruise. This may also include shore excursions (usually at extra cost). Fly/cruise is a convenient and popular way to travel. It is usually the most expensive way, but the advantage of selling a most pleasant way to travel can be an advantage. The educational phase of the tour can also be easily accommodated on board the ship. Usually the ship serves as the hotel accommodation, so you usually don't plan excursions very far away from water.

Many tour agents and some cruise lines offer attractive packages, such as: Fly LA to Acapulco, board the ship for a cruise down the Latin American coast, through the Panama Canal and end in Aruba for flight back to U.S.

This type of travel has been adapted to include some professional educational/travel programs that have proved popular with doctors, lawyers, etc. because portions of the expense can sometimes be written off as tax deductions by the professional alumnus.

b. Fly/Bus/Train touring. An example would be a ground tour of Europe. This style has the disadvantage of having to use many airplanes/buses, hotels, and so on during the course. However, good planning can lessen this disadvantage. Sometimes this is the only way that your group can visit many of the significant places in the world.

c. Bus touring. Examples are a trip through New England to view the autumn foliage or a trip to a music festival.

This type of trip has some advantage in these days of ever-increasing gasoline costs and small cars. There are many opportunities for education and fellowship in this type of travel. You should keep this type of tour fairly short. Make good overnight accommodations available to ensure maximum satisfaction.

d. Recreational vehicle travel. This can be a popular way of putting together an alumni tour of those ever-increasing number of alumni who have their own rigs or equipment (trailers, motor homes, tent trailer, even tents).

This is also an attractive way to provide a family outing at little extra cost. Usually the alumni association maps out the itinerary, provides a traveling professor, makes overnight reservations at public or private campgrounds, provides admission to various sites along the way and some group meals. Participants get to know each other well and seem to enjoy the experience.

Examples include a 21-day tour to Mexico City (with a flying option to Yucatan); a four-day tour of various Indian ruins and pueblos of the Southwest; a Rocky Mountain adventure through Wyoming and Montana, an American Heritage Tour of Revolutionary War or Civil War sites of the Eastern United States, and the like.

Enough about types of tours -- you are limited only by your imagination and enthusiasm.

2. Where You Go

Where you go often depends on what you want to accomplish. You obviously would not schedule a strictly recreational tour to Death Valley, but that may be an excellent site for a tour designed to teach art or mining history.

Be aware that fads in travel play an important part in selecting a place alumni may want to visit. Sometimes and with some people you can't sell a trip to Europe -- at other times that is all you can sell. By all means talk to and survey your alumni, but don't put all your eggs on a random sample. The best way, in my opinion, is to make the soundest decision you can based on what facts you have. Then try to sell the tour. Design the tour so that you have enough flexibility in time and arrangements to make changes, if necessary.

You will find that once you have conducted some tours you will have a tour clientele who will go on most tours. You therefore need to go to different places to accommodate these people and attract new alumni travelers.

Listed below are some tours that have proven to be successful for some alumni associations:

Big Bend Country of Texas (bus)
Yucatan/Mayan Ruins (Fly/bus)
England Revisited (fly/bus/train)
River Run of Green River (raft)
Russia -- Lenningrad/Moscow (fly/bus)
Mediterranean Cruise (fly/Cruise)
Mississippi River Cruise (fly/cruise)
Japan and the Two Chinas (fly/bus/train)
Greece and the Three Seas (fly/bus/cruise)

Across South America (fly/bus)
Middle East Odyssey (fly/bus)
Around the World (fly/bus/train/cruise)
Southeast Asia (fly/bus/train)
Alumni Ski Trip (bus)
Along the Danube (fly/bus/cruise)
The Castles of the Rhine (fly/bus/cruise)
Spain (fly/bus)
Mexico Camper Caravan (RV)
Caribbean Cruise (fly,cruise)

Here's a word or two about the timing of tour planning. A simple (if you can call it that) trip to a bowl game can be put together in 30 days or so -- sometimes that is all the time you have to plan. We have found, however, that if there is ever a chance of a bowl bid you should make tentative arrangements months in advance. Most hotel and airlines will work with you if they feel they will get your business.

As a general rule, it takes at least six months to properly promote/sell a tour and four-to-six months to properly plan from scratch. So you should allow a year lead time in the planning and promotion phase. If the tour is prepackaged by a tour agent you won't need as much time in the planning phase. But you should still count on six months to promote and sell it.

If you can, advertise your general tour destinations up to 18 months to two years in advance so your alumni can plan to be with you -- it helps!

3. When You Go

Alumni tours can be and are run successfully in all months of the year. The southern hemisphere has summer when we are in winter -- some locations are great at any time of the year. Some alumni associations find ski trips among the most successful.

Just a few guidelines:

a) For family travel, stick with June/July/August

b) For longer/expensive tours (that would appeal to older affluent alumni) go to a warm place in the middle of the biggest snow storm of the year -- they'll love you for getting them away from it all.

c) Check out the average weather situation in your location -- several publications have this information (i.e. Rand McNally and Pan Am publications).

d) Check out dates for special events when you want to go (i.e. Passion Play in Germany -- once every ten years; Cinco de Mayo celebration in Mexico City) and see if you can work them into your itinerary.

e) Check out "off season" rates and the dates they are available (i.e. a ski resort during the summer; cruise ships deal a lot with this type of travel).

4. Cost of the trip

There are two aspects to this question -- cost to participant, and cost to the alumni association.

Our feeling is that alumni travel programs should pay for themselves with perhaps a modest return to the alumni association to cover potential losses in the future. An alumni tour program designed to make money for the association or the university could raise IRS flags. It will probably not sell anyway because tour programs are very competitive and participants shop around for best deal they can get.

a. Cost to participant

Once again it depends on the type of tour. A few guidelines may be useful:

Most alumni tours should be in the "first class" to "deluxe" category -- at least as far as hotel and ground accommodations are concerned. Your participants are not students and will not usually put up with poor-quality facilities. These factors are very important to American tourists overseas who are accustomed to very good accommodations when they travel. They will also form their opinion of the tour, in major part, based on the quality of their accommodations. Even if they see the seven wonders of the world and are taught by Nobel prize-winning professors, one of the main points of conversations with their friends (who, by the way, are your next customers) will be how well the bathroom worked (or didn't).

Especially if your tour is an educational one, include the cost of side trips in the total package -- often these are sold separately to keep published cost to a minimum. Failure to do this usually results in a lot of "hard sell" moments on the tour, and participants feel as if they are being "nickeled and dimed" to death. Often they will resent the pressure. This is especially true if you "option out" the most important things to see in the country or area.

Options can work sometimes but should be kept to a minimum for maximum tour satisfaction.

After a tour agent has quoted you a figure that the tour can be sold for, call another agent and without letting him or her know of your plans, ask for what price a similar tour can be purchased by a single person. This will give you a handy comparison to use in your decision and your sales campaign. Of course, the tour price should be less than that of the single person. It should be a good deal less or else you won't be very successful. This should still be the case, by the way, after you have added on your costs for the educational offerings, extras, etc.

b. Costs to the alumni association

Everything you add is liable to cost money, so pick the most important factors and resist some that may not be too important. Once again, the costs can and should be figured into participant cost. Some of the "musts" should include:

1. A quality educational package. Often a professor will go on the tour with no honorarium. This is especially true if the spouse can be included at a discount or no cost. (See "who leads the tour" for more information.)

2. Alumni staff leadership. This person usually handles all logistics and relations with the tour agent and/or representative.

3. Some form of identification for participants with the alumni association and institution. Some alumni associations use special names (e.g. "Flying Longhorns"), name tags, luggage tags, special flight bags, banners, hats, whistles, and so on.

4. Welcome aboard letters and other printed material to participants before, during, and after the tour. Some alumni associations print special itineraries, booklets, tape recordings, lecture notes, a journal for participant's use, and the like.

5. Verbal communications while on tour. Everything should be done in the name of the alumni association.

Often the tour agent/carrier/hotel, will provide one space free per X number of tour members (it has been 15 in the past, but that changes frequently). This is a good way to provide for your educational and alumni staff leadership. Be sure to check this out with your agent.

Remember that a price will make or break a tour. Remember, too, that you have alumni who can't afford to go far for long periods of time. But also keep in mind that you have alumni who can spend $8,000 to $10,000 or more per couple on just the right tour.

5. Length of the trip

At present the 8-14 day tours seem to be the most popular, although tours of varying lengths have been successful. What seems to make the biggest difference is where you go and how much it will cost the alumni.

Generally speaking, many people now have longer vacation periods available to them. You want to leave people with the wish that they had more time rather than the wish that it was all over before the tour ends.

6. Who leads the tour

There are at least three possible answers to this question -- the academic type (or the top university officials on the board), the tour agent (or representative), or the alumni staff person. Although experience and expertise are hard to do without, we suggest that the alumni staff person take the leadership after becoming as well informed as possible about all aspects of the tour.

First of all, it is important to the smooth operation of every tour that only one person deal with agents and their representatives. This is the only way to avoid the confusion and misunderstandings that may cost you money as well as good PR.

Secondly, the person who handles pretour contact with the participants or tour agent is probably the alumni staff person. To participants he or she is the tour director.

Thirdly, you want to be sure, for long-term purposes, that the tour is conducted as you plan it. Therefore, the alumni staff person should carry that role as the individual representing the continuity of the alumni tour program.

The role of the academic type who provides the educational package is an important one. This person usually doesn't want to be bothered with the small details of luggage, rooms, name tags, etc. Although you can find exceptions to that general rule, it is usually the professor who gets too involved and becomes less then helpful.

The academic person may (and probably should) be involved in the final itinerary selection so that he or she has input into where the tour is going and so that he or she can be informed of what lectures will need to be provided at the specific locations.

D. EDUCATIONAL ELEMENTS OF ALUMNI TRAVEL

The educational component of an alumni tour program should consist of as much material as the participants can handle. You should err on the side of too much rather than too little. It is the education input to the program that sets this tour apart from one operated by the local travel agent. In a sense this is the "personalizing" you add to the tour to make it a unique experience for your alumni. This is what they will remember and tell their friends about. This is what will make the long-lasting impression that your institution is making the lives of people change for the better.

An example may help. On a recent two-week fly/cruise tour of the Mediterranean there were five pretrip lectures (also used as promotion nights for the tour) by five professors (only two of whom went on the trip). There were 14 lectures during the cruise, some given on board the ship and some given on site in Egypt, Israel, Turkey, and Greece. This trip was the "seventh annual" conducted in this fashion, so something is being done right!

In short, get good advice from other colleges and tour agents, price the tour right, lead with enthusiasm, and have a great time.

LEGAL CONSIDERATIONS OF ALUMNI TRAVEL

John Bisset
Firstrav International

During the past several years, much has been written about a variety of legal issues relating to an alumni association conducting or sponsoring a tour or travel program. Generally, the focus or "slant" of most of these articles has tended to emphasize such areas as: IRS rulings as they relate to accounting for income generated by a travel program; postal regulations and the use of a school or organization's nonprofit mailing permit, and IRS rulings regarding personal tax implications when a person from the organization accompanies the tour as a guest or host.

Because of the amount of information available on these subjects, only a brief summary of some of the more important rulings affecting these issues will be presented in this article. Every alumni association should have sufficient data on hand to be well-informed regarding these issues and should conduct its tour or travel program accordingly.

First, the IRS has clearly stated that the operation of a tour or travel program by a university alumni organization is not exempt from federal income tax since the income received is produced from a commercial service and not an educational activity. Second, the U.S. Postal Service has taken a rather dim view of nonprofit associations using their mailing permit to promote "commerical activities" and, depending on regional jurisdictions, has forced some organizations to use a standard commercial bulk rate mailing permit as opposed to their nonprofit permit. Third, there is the question regarding personal tax liability when an association executive accepts a "free trip" or a host from the organization accompanies a sponsored tour.

The IRS has generally held that there are two technical means through which the value of the trip would be nontaxable. The first would be exclusion from income altogether. This would occur either where most of the recipient's time is spent performing duties for the employer, or where the trip has been awarded as a gift instead of compensation. The second means of obtaining nontaxability is by virtue of using standard allowable business deductions from income. In this case, it must be demonstrated that the primary purpose of the trip was for business and not for pleasure.

As mentioned earlier, these issues, although important and relevant, have been discussed and written about in great detail, and information is readily available to the association executive. Therefore, the main purpose of this article is to plow new ground -- to briefly examine the complexity of the travel industry itself. I will discuss some legal considerations relating to the actual execution of a tour, such as some of the risks and remedies if the services are paid for but not rendered, or if there is an unfortunate accident or injury during the trip itself.

Much like the sale of products, travel services are sold by a complex marketing and delivery system that includes suppliers (carriers and hotels); middlemen (tour operators and wholesalers); retailers (travel agents); informal travel promoters (alumni groups); and guarantors (depository banks, surety companies, and regulatory agencies). For example, a package tour vacation to Denmark may involve an air carrier delivering round-trip air transportation; a hotel delivering accommodations, facilities and services; a local tour bus company delivering tours of local sights; and a tour operator who organizes and promotes the package tour. It may also involve an alumni association that sponsors the package tour to its membership, a surety company that issues a surety bond providing some measure of protection for contractual defaults; and a depository bank that collects and disburses the traveler's contract payments to various suppliers and tour operators. If one or all of these participating entities fail to deliver part or all of the travel services advertised or contracted for, then the aggrieved parties could initiate legal action.

Insofar as the association is concerned, regardless of the extent of direct involvement in the actual planning, organizing, and execution of the trip, a cause of action against the sponsoring organization could materialize based on the argument that the sponsoring organization acted as a surety vis-a-vis the faithful performance of the tour operator in delivering the contracted for travel services. More than likely, however, this will not occur, since most reputable tour operators and travel companies are well financed, adequately bonded, and have insurance in sufficient dollar amounts to cover such contingencies and protect both the organization and individual traveler. Unfortunately, when this is not the case, recovery for damages is often difficult and complicated by a number of legal issues.

For example, in analyzing a potential travel case, lawyers may be faced with defendants that are foreign corporations not subject to local jurisdiction (hotels and local tour bus companies) or defendants that become insolvent prior to or shortly after litigation is commenced (tour operators and travel agents). Also included in this category are defendants that are insulated from liability because of the protection afforded by a tariff system (domestic carriers), an international treaty (international air carriers), or an enforceable disclaimer (domestic tour operators and cruise ships. As a consequence, the prosecution of a given travel case by an aggrieved traveler or sponsoring organization may involve a variety of disparate legal theories.

And, although the avenues of remedy abound, the question would have to be asked: Is it worth the time and expense based on an uncertain and unspecified return? Of course, the answer would depend on the amount of monetary loss and the availability of solvent and responsible defendants.

Insofar as accidents or injuries are concerned, it is not totally uncommon for a traveler to sustain physical injuries while on vacation. Such accidents may occur at a foreign hotel, during tours of local sights, or while on board a foreign air carrier or cruise ship. Assuming probable negligence, the problem with such defendants is how to subject them to the jurisdiction of the local court. The traditional view on jurisdiction over foreign travel entities is that they must be present in the jurisdiction. The test of "presence" has been the "solicitation - plus" doctrine, with the "plus" usually meaning the power of local travel agents or representatives to confirm reservations. As a result of this doctrine many foreign travel entities make certain that reservations for their services are "confirmed" outside of the jurisdiction, thus effectively insulating these entities from legitimate claims. However, there are legal steps that can be taken, particularly when the foreign travel entity has contracted with a tour operator. In most cases, the presence of a tour operator working with the foreign entity should subject the foreign entity to jurisdiction as well.

It should also be pointed out that domestic or international air carriers are protected to some extent from the full burdens of common law liability by a domestic tariff system or an international treaty reducing recoverable damages arising from physical injuries; flight delays; and lost, stolen, or pilfered baggage. However, most reputable tour operators and travel companies offer their travelers comprehensive insurance packages at a minimal cost covering accident and limited sickness expenses; trip cancellation; interruption and emergency evacuation benefits; and baggage protection against loss, theft, or damage. This is something all travelers should be aware of and encouraged to purchase for their own protection.

From a legal standpoint, it is absolutely essential, when attempting to recover damages either for services paid for but not rendered or for personal accident or injury, to identify defendants who are "solvent and available" from among a host of travel entities, even though some may be more "responsible" than others for the damages incurred.

From an association standpoint, you should be aware of the fact that there are potential risks involved in sponsoring a travel or tour program, and the association may have some exposure. However, as mentioned earlier, in practicality these risks are fairly minimal. With the assistance of quality travel companies and tour operators, proper safeguards and protection plans are available to make a travel program for your association a most rewarding and worthwile activity.

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THE CARE AND FEEDING OF TOUR PARTICIPANTS

Frank B. Jones
Indiana University

There are all kinds of organizations sponsoring group travel abroad. Yet, when you think about it, the alumni-hosted tour has a unique advantage over tours offered by other organizations. This advantage is the fact that universities have graduates who live overseas. Conducting an overseas tour program without providing contacts with these alumni is unthinkable. This requires pretour correspondence with such alumni, among other things. Again, whenever alumni groups travel, they should recognize the value of meeting with alumni who live abroad.

I believe that, to make a tour effective, there should be official hosts with clearly defined responsibilities. A tour host can be a university officer, a member of the faculty, an alumni association leader, or other well-known alumnus. In addition to the host, there should be a staff member assigned to every tour involving more than 60 persons. The director of alumni travel programs should meet with the host before and after every trip to go over a checklist of responsibilities.

RESPONSIBILITIES OF THE TOUR HOST

There are six main responsibilities of a tour host. (1) The host should understand that the general purpose of the tour program is to build alumni support both for the university and the alumni association. (2) The tour host should help members have the opportunity to continue to learn about the university and to be aware that the travel program is an educational program for alumni. (3) The host should assist tour members in broadening their acquaintanceship with other members and alumni living overseas. (4) The host should check for sickness and accidents among tour members. Many times, people do not know what to do when they are sick overseas. They are reluctant to call the travel agent about their sickness and retire to their rooms to suffer in silence. (5) The host must serve as a link between the tour agent and members of the tour. Many travelers do not realize the services available to them through proper use of the travel agent's professional knowledge. (6) The tour host should present a written tour evaluation after the trip. This is invaluable. It helps the tour planner in the alumni office evaluate both the marketability of future tours and the efficiency of the tour operator.

As I mentioned, it's important to involve alumni in the countries to be visited. This requires planning several months in advance, since international mail can be very slow. A tour host must be prepared to meet foreign alumni who are invited to meet tour members.

He or she should take along badges, souvenirs, decals, pictures, certificates, and other materials of interest to alumni living abroad.

SPECIAL EVENTS

Get-acquainted parties at the beginning of the tour and a reception on the final night of the tour are important parts of any program. However, perhaps the alumni association's finest reward in terms of evaluating the program comes with the reunion of tour participants, held three-to-five weeks after the tour. The reunion provides an opportunity for people to share pictures, slides, and so on from the tour. Some veteran tour members seem to use their time to greater advantage and see more things on a tour, and newer travelers can learn from them. The reunion also cements new friendships.

We've also had success with pre-tour lectures on the geography and languages of the areas to be visited. This is especially important on tours involving historical sites. A tour to the ancient Mayan cities of Mexico can be more valuable to alumni if they spend an evening studying the Mayan civilization before they go. In addition, give alumni clubs overseas an opportunity to schedule a meeting involving tour members. This in many cases brings out local alumni to meet the visiting alumni and produces personal invitations for tour members to visit homes or take special tours in the city or country involved.

TAKING CARE OF PROBLEMS

The tour host should be prepared to deal with problems common to traveling with groups as well as those unique problems that might arise at any time. Perhaps the most common problem is dealing with a group of travellers who have just learned their airplane will not leave on schedule. You can't blame a tour agent for the lateness of an airplane, but he or she can be blamed for not keeping tour members informed of exactly what is happening. Whether there's a delay with an airplane, a bus, or a hotel, it is important that tour members be told at all times what's going on. It is the role of the tour host, in working with the agent, to do everything possible to keep rumors from starting and spreading. He or she must also keep people informed as to the problems surrounding delays. Other problems, such as incompatible roommates or unacceptable hotel rooms, are items the tour host can work with the tour agent to solve.

The toughest problem to handle is the death of a tour member. A similar problem would be an accident that involves injury to one or more tour members. Of course, such a sad happening taxes the abilities of the tour host, who must become the communicator between the family at home, the tour agent, and, of course, the rest of the tour members.

The legal details of such occasions are the responsibility of the tour agent, but the rapport among the tour members is the responsibility of the tour host. If a physician is traveling along with the tour, he or she can be a great help in time of accident, illness, or the death of tour members.

Experience indicates that "misfits" appear on tours no matter what you do to try to prevent them from signing up. A person who refuses to board the tour bus on time or a person who has no concern for others can be harmful to a tour. I feel that the best way to approach this kind of person is to be forthright and honest. Tell the individual that the actions in question could jeopardize the enjoyment of the tour for the other members. I have even offered to pay for a homeward-bound ticket for a tour member who was not able to get along with fellow alumni tour members.

KEEPING THE TOUR HOST INFORMED

Other directors of tours keep a master file on every tour. This master file contains all mailings and personal correspondence sent to or received from alumni regarding the tour. It includes the names of alumni who indicated a particular interest in the tour as well as a final list of those who signed up for the tour. Also included are special requests such as diabetic diets, special room arrangements, and so on. These are copied and put into a special packet sent along with the tour host. The first name of every individual on the tour, including nicknames and the degrees he or she has received, are also kept in the folder. We also give the tour host information regarding such things as birthdays, wedding anniversaries, and any other special occasions. After the tour, the tour host's evaluation forms sent back by tour participants also go into the folder. We add financial statements involving the cost and income on the tour.

It is essential that the tour host read through this folder before the tour begins. Sometimes the host will also read the folder after the tour. This folder is valuable in planning future tours to the same area. When you have three or four years of tour experience you realize that repeat tours are sometimes more effective than tours to new places.

SOME ADDITIONAL THOUGHTS

Insurance coverage for your participants can be a good service. If the tour host sends a letter introducing himself or herself before the tour takes off, be sure to mention the value of baggage-lost insurance and trip life insurance, as well as insurance to cover a refund if a person has to cancel due to emergencies.

A tour host should take an instant-developing camera and enough film to photograph tour participants at memorable spots during the tour. I give these pictures as a gift of the association. The cost is not great, and the gesture makes for good relationships because few people on the tour have Polaroid-type cameras.

The staff tour host should be given some funds for emergencies and for entertainment of tour participants. Be sure to allow shopping time when and where appropriate.

Hosts should keep a log on each tour. It should include observations on hotel accommodations, local sight-seeing tours, guides, agents, and individual participants so that future trips can be made more meaningful.

When the tour returns, the host should promptly send a friendly letter and evaluation questionnaire to each participant to ascertain the effectiveness of the tour.

Hosting a tour group is hard work and requires 24-hour availability. The alumni realize the tour host is not paying his or her own way and thus is traveling on money paid by the group. The assignment is one of much responsibility, and the touring alumni have a right to expect the tour host to perform in a professional way. For the host to be aloof, uninvolved, or to spend too much time with a select number of alumni is to promote poor rapport among tour members -- thus undoing the purpose of the program.

In fact, if a tour program runs smoothly, it means that the tour host, as well as the people behind-the-scenes, have been working like mad!

MARKETING AND PROMOTING ALUMNI TOURS

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The marketing of an alumni tour starts when you select the trip and it never really ends. Like the annual giving program in which your best fund appeal for the next campaign is the way you handle the donor's gift this year, the manner in which you conduct your travel tour now will affect future participation.

To be successful, you must be convinced personally of the value of the product you are marketing. Know that you are providing a unique service to your alumni. No travel agent can provide what you can -- personal attention, congenial travel companions, learning opportunities, and so on. There's a common bond established among the participants of an alumni tour that the travel-for-profit operator cannot duplicate.

Second, don't enter the travel arena with the idea of using it as an overt fund raiser. The alumni travel program should be a service program first. Gifts will come from the participants of your travel program if your marketing job is effective and your tours are well-managed.

From 1971 through 1974, one major public university attributed the following to its tour program: 11 new members of the Presidents Club (donors of $1,000 + per year); 115 new Century Club memberships; 129 new contributors; and 63 former donors who increased their contributions after the tour.

Here are basic guidelines in the marketing of alumni tour programs:

The staffing of the tour is of primary importance. The personality of the staff person(s) can be the key to a successful tour. Staff the tour with carefully selected university personnel and volunteers in the alumni/development area.

Send at least two staff persons on the tour, one of whom may be a volunteer worker (i.e., president of alumni association, chair of annual giving, chair of the development committee, etc.). Staff and volunteers should go on the tour with specific responsibilities detailed in advance.

A helpful attitude is perhaps the most important attribute that a staff or volunteer worker can have. Experienced travelers soon learn that, in the travel business, there is no such thing as a "freebie"; somebody is paying for everything. It does not take much imagination to realize that the "somebody" is usually the tour participant. Therefore, it is important that those who go on the tour as working representatives distinguish themselves as helping hands who make the tour successful for the participants.

Some alumni associations have sent the university president and other top administrators as guests and have reported positive results.

There are many variables in the marketing of an alumni travel program. The following procedures have worked effectively at one major institution:

1. Each tour is designated two years in advance by the board of governors of the national alumni association.

2. A general brochure listing all tour offerings is written and designed in cooperation with the travel agent(s). The university sends the brochure to all alumni of record. These brochures, which cost about 4 cents each, are an important part of the service program. They inform alumni of future tours and serve as a reminder that the national alumni association is doing something for alumni.

3. A brochure on each tour is mailed six months before the tour. This brochure, prepared by the tour agent, is sent with a letter from the president of the national alumni association. This mailing goes to current contributors because the tour program is limited to contributors to the annual giving program and their immediate families.

4. Responses to the brochures come directly to the alumni office, which sends an initial acknowledgment.

5. As soon as the university receives reservations (with the required deposit), it sends a questionnaire with a "welcome aboard" letter from the tour host (staff or volunteer). This questionnaire asks for information, including campus attended, class year, occupation, other members of family, business and home address, name of spouse, smoking status, etc.

6. The tour agent is then informed. He or she sends out such things as a receipt for deposit and information on passport, insurance, currency exchange, innoculations required or recommended, weather, and so on.

7. The information from the questionnaire is compiled into a directory which is distributed to all participants two weeks before departure. This allows people to continue the relationship initiated by the tour.

Many universities offer such services as tape lending libraries, specialized luggage identification tags, personal

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tour journals, and group and/or individual photographs. These services help make the tour more pleasant and encourage participants to go again and to tell others about the experience.

Remember that marketing never ends. The personal attention you give to alumni on each tour will bring you great benefits in the future.

Appendix: Supplemental Articles and Checklists

ALUMNI TRAVEL GLOSSARY

Affinity charter. The contracting of space on a plane by an affinity group.

Affinity group. This term applies to a group of persons traveling together on the same flight who are members or employees of the same association, corporation, company, or other legal entity, which has principal aims and objectives other than travel, and has sufficient affinity to distinguish and set it apart from the general public. Each member of the group must be a member or employee of the organization or company at the time that written application is made, and must have been a member or employee for at least six months prior to the date of commencement of travel. The group can include the spouse and dependent children and the parents of the person who is the member or the employee. The parents, however, must live in the household with the employee or the member. The spouse, dependent children, or parent must be accompanied on the flight by the member or employee.

American plan A hotel plan under which the daily rate includes the cost of the room and three full meals. (See "European Plan").

ATC (Air Traffic Conference). A division of the Air Transport Association responsible for establishing standards and methods by which the domestic airlines agree to deal with each other as well as methods by which the entire airline industry in the United States should deal with various segments of the travel industry, including international airlines, travel agents, and so on.

Back-to-back (adjective). A travel program operated on a continuous basis with several groups using the same equipment or services a minimal number of minutes or hours between the departure of one group and the arrival of the next.

CAB (The Civil Aeronautics Board). The federal agency responsible for regulations governing international air service to and from the United States as well as U.S. domestic air service. The CAB considers such aviation matters as need for air service, public convenience and safety, equitable air fares, and regulation of air transportation (cargo as well as passenger service). The CAB controls rates, schedules, airlines routes, and charters.

"California" king-size bed. According to the National Association of Bedding Manufacturers, this is the terminology applied to king-size beds that are marketed in California and many parts of the Southwest. The measurements of this bed are 72 inches wide and 80 inches long.

Charter (verb). To contract for the exclusive use of all or a specific number of seats or amount of space on land, air, or water conveyance for a specific period of time and for a specific itinerary.

Closed-End (adjective). Description of a travel program that limits the number of participants by one or more factors such as budget, job classification(s), job performance, or capacities of conveyances or hotels (see open-end).

Coach. No restrictions.

Comp rooms (complimentary rooms). The rooms that a hotel offers to a group in ratio to the total number of rooms occupied by the group. Today, for the most part, the going figure is one comp room for each 50 rooms occupied by the group.

Concierge. The title or position of the staff person in European hotels who handles such duties as porter services, mail, reservations for the theater and other events such as tours, sports events, etc. Practically all European hotels employ a concierge, and so do some hotels in other countries.

Configuration. The arrangement of seats within an aircraft. The seating pattern would determine the number of seats and the amount of space between seats. Example: A DC-8 stretch aircraft with a configuration of 252 seats would allow a pitch of only 32 inches for the majority of seats. The same plane with a configuration of 219 seats would give a pitch of 38 inches.

Coupons. Lightweight tickets supplied to participants in a group travel program to be used for such items as meals, hotel rooms, sight-seeing tours, and other features of the program. Also frequently referred to as vouchers.

Courier. The person who supervises the arrival and reception of travelers through customs and immigration at borders and ports of entry. The courier is usually a local person who is known to the border officials.

Deluxe night coach. Travel at certain hours, generally between 9 p.m. and 7 a.m., but in the first-class cabin.

Denied boarding compensation. This term refers to the refund of airfare that a passenger will receive from an airline in the event the flight on which he or she is booked cannot accommodate him or her due to overbooking. If the airline does not furnish passage to the destination within two hours of the originally scheduled departure, the airline will obtain a seat on a flight that departs the soonest thereafter and will also refund to the passenger the full amount of his fare.

Direct flight. A plane trip between two points when the aircraft makes one or more stops. In spite of the stops, the passenger taking a direct flight does not have to change planes.

Double bed. Officially, this bed measures 53 inches wide and 75 inches long, large enough to sleep two.

Double double. This phrase refers to a room with two double beds. It can be occupied by one, two, three, four, or more persons. It is sometimes called a family room.

Double room. A room with one double bed used by two persons.

Dry lease. The rental of a plane without any crew or other personnel. (See wet lease).

European plan. This hotel phrase indicates that the daily rate covers the room only; no meals are included. (See American Plan).

FAA (The Federal Aviation Administration). This agency exercises control over all civil aviation: airports, equipment, pilots, security regulations, traffic control systems. The FAA licenses both private and commercial pilots.

First class -- No restrictions.

FIT (foreign independent tour). A tour to a foreign country designed (tailor-made) to an individual's specified desires or requirements.

Full American plan (FAP). Same as American plan. A hotel plan under which the daily rate includes a room plus breakfast, lunch, and dinner.

Garni. This word attached to the name of a hotel means that it does not have a dining room or restaurant.

GIT (group inclusive tour). This phrase is covered under the definition of tour basing fare. Available on scheduled flights, minimum sizes vary with destination, generally 10-15 passengers. Wholesalers and carriers make up the minimum group.

Group fare. Ten or more passengers must book at least seven days in advance and must travel together on the outgoing portion of the flight.

Group inclusive tour (roundtrip). Twenty or more people, but a maximum of 30, must leave on a Saturday and return no later than 12:59 p.m. the next day.

Group travel. A travel program or plan organized and designed so that all participants will depart on the same conveyance and follow the same schedule of activities upon arrival at their destination.

Group travel specialist. This term, comparatively new but attaining wider usage each year, means those travel agencies that specialize in designing and handling group travel. Group travel specialists are travel agents, but not all travel agents are group travel specialists.

Hopscotch. Discount on carrier's one-class service; no advance bookings; flight must make one or two stops.

Hot tag. A special colored or coded tag placed on a VIP's luggage to ensure special handling.

IATA (pronounced "eye-AH-ta"). Abbreviation for International Air Transport Association, the world travel association of airlines that operate international services. IATA provided the machinery which makes it possible for the world to benefit from a universal system of air transportation.

Incentive travel. A motivational program designed to stimulate achievement of pre-determined goals and objectives by offering travel as a reward. Incentive travel might be used to achieve hundreds of different goals. Some are: to increase sales, to stimulate productivity, to reduce operating costs, to reduce absenteeism and/or tardiness, to achieve fund-raising goals, to stimulate membership campaign, etc.

Incentive travel company. A firm that offers a professional service of designing, promoting, and executing an incentive travel program for a company, organization, religious institution, or other type of buyer wishing to stimulate greater achievement among a segment of its employees, members, customers, staff personnel, etc.

King-size bed. An oversized bed (the largest standard bed on the market) measuring 76 inches wide and 80 inches long. The extra long king-size bed measures 76 inches wide and 84 inches long.

Match anybody fare. Restricted seating, no stopovers, no standby, subject to availability.

Modified American plan (MAP). This hotel plan refers to the daily rate that includes breakfast and dinner in addition to the room. (See "European Plan"/"American Plan").

Net net. The actual cost of a program excluding mark-up or commissions.

Night coach. You must travel between certain hours, generally between 9 p.m. and 7 a.m.

Non-affinity group. Similar in nature to an affinity group, except that the participants in this group do not have to belong to the same organization or be employees of the same company in order to benefit from reduced fares on certain flights. The group may be formed from among the general public, but all the tickets must be purchased through one source.

Non-sked. A supplemental airline. An airline that offers passenger and charter services on a non-scheduled basis; sometimes referred to as a charter airline.

OAG (The Official Airline Guide). The manual published in various forms by the Teuben H. Donnelley Corporation and used in almost all parts of the world where air travel is a way of life.

Open-end (adjective). Describes a travel program that does not limit the number of participants or winners. (See closed-end).

Pension. A French word widely used in Europe to denote a boarding house or guest house (with both lodging and meals provided).

Pitch. The space occupied by an airline seat. The pitch is the distance between the back of one seat and the back of the seat behind it. The greater the pitch, the greater the comfort (more leg room).

Plateau. There are two meanings to this word in the incentive travel language. The first meaning refers to a program that offers two or more destinations, each having greater appeal over the other, thus providing added motivation for extra achievement. The second meaning refers to a program that offers one destination, but uses various levels of achievement (plateaus), permitting participants to pay for part of the cost of the trip at the lower plateaus.

Plus-plus. This phrase is used primarily when discussing prices of food and liquor. A menu that costs $9 plus-plus will actually cost $9 plus the percentage set aside for gratuities to the captains and waiters plus the percentage for total government taxes (if any).

Promotional. Nonstop, direct, no advance booking.

Pro-rata affinity charter. The term is used to denote that the cost of the entire charter will be divided among the number of passengers who are transported.

Queen-size bed. Larger than a double-bed and smaller than a king-size bed, it officially measures 60 inches wide and 80 inches long.

Rack rate. The regular rate (not discounted in any way) that applies to each hotel room. The room rate that would supposedly be offered to any transient guest (as opposed to special reduced rates for groups).

Rooming list. The list supplied to the hotel by the group travel specialist which lists the names of all persons in the group who will be housed in that hotel, along with such other vital factors as arrival date, departure date, room rate, type of room, whether any deposit has been received, the size of the room deposit, etc.

Run-of-the-house-rate. One rate for all available hotel rooms (regardlss essioess of location), not including suites.

Single entity charter. This phrase applies to a charter flight the expense of which is borne exclusively by a single person, company, or organization. The individual passengers bear no expense, directly or indirectly.

Single room. Conversationally referred to as "a single," this is a hotel room occupied by one person.

SKED. This abbreviation stands for scheduled airline, an airline which publishes a schedule of regular flights between given points. (See non-sked).

Special interest trip. Same as special interest tour. A travel program for groups of persons with common interests that prompt them to travel together for such purpose as a golf weekend, a summer visit to Europe's music festivals, a business retreat, a tour of famous museums, churches or art galleries, and so on. For the most part, special interest tours are not combined with any type of business session or educational meeting. Usually they are not tax deductible.

Super coach. Reduced coach fare for a certain number of seats allotted on each flight.

Supersaver advance day coach. Reduced fare which you must book 60 days in advance and stay over one Saturday night.

Supersaver advance night coach. Same as supersaver advance day coach, but you must travel between 9 p.m. and 7 a.m.

Supersaver day coach. You must book 14 days in advance, stay over one Saturday night, and stay no longer than 60 days.

Supersaver night coach. Same as supersaver day coach, but you must travel between 9 p.m. and 7 a.m.

Supplemental airline. Sometimes referred to as a charter airline, the supplemental airline is one which does not publish a schedule of its flight or its fares. It is a non-sked.

Supreme supersaver. Excursion rates for certain dates during the year -- off-peak periods. You must buy your tickets 21 days before the flight and stay no longer than 15 days.

T & T (tax and tip). This phrase is usually used when discussing the cost of food and liquor. If the price of cocktails is quoted at $1.50, it is important to specify whether $1.50 is the price including T & T, or whether T & T must be added to $1.50 to obtain the actual cost.

Tour-basing fare. A reduced round-trip fare available on specified dates and between specified times only to passengers who purchased pre-planned pre-paid tour arrangements prior to departure. Tour-basing fares apply to group inclusive tours, incentive groups, contract bulk inclusive tours, tour basing, and group round-trip inclusive tour basing fares.

Tour operator. A company, sometimes called wholesaler, that creates and/or markets inclusive tours, and/or performs tour services, and/or subcontracts its performance. In most cases, a tour operator will sell to a travel agency or group travel specialist.

Travel agent (agency). A person or firm that qualifies to handle and sell all elements of travel to the general public. These elements include such items as hotel rooms, meals, all types of transportation, cruises, tours, sightseeing, etc.

Twin double room. Same as double-double. A room with two double beds.

Twin bed. A narrow bed with official measurements of 30 inches wide and 75 inches long.

Twin room. In hotel language, this phrase is shortened to twin. It is a room with two twin beds occupied by two persons.

Very simple saver fare. No restrictions, but only a limited number of seats are available on each flight.

Wet lease. As opposed to dry lease, this is the rental of a plane complete with supplies, fuel, and maintenance service.

Wholesaler. Same as tour operator. One who creates/markets/subcontracts the performance of inclusive tours and tour services.

FREQUENTLY ASKED QUESTIONS AND THEIR ANSWERS

We attempt to answer some frequently asked questions regarding alumni travel. We do not guarantee the answers to be in full compliance with federal and local regulations when you are reviewing these items. Because federal regulations change often and local requirements vary, we suggest that you check out your own answers. We pass these on to you as guidelines and suggestions.

1. QUESTION: What are tax implications on alumni tours for the alumni association and for individual alumni officers?

   ANSWER: This is an area that is changing rapidly. We suggest you contact your legal counsel. Generally speaking, the more educational a tour is, the better the chance of having it tax exempt. Have your legal counsel look into laws regarding non-related business activity for nonprofit associations.

2. QUESTION: How do you protect the alumni association from financial loss?

   ANSWER: First, be careful in your wording of the official travel offering (the travel brochure). Make sure that deposits (we suggest $100 per person) accompany each reservation. Ensure that the deposits are held by the alumni association along with all other full payments (they may even be invested if time permits) and then ensure that the alumni association pays the bills on time and upon demand. You may wish to look into some type of escrow account. Do this especially if money is being received or held by a separate tour agent.

3. QUESTION: Does the big tour operator have insurance to cover law suits by dissatisfied customers?

   ANSWER: Insurance of this type is available. It is always good to ask if your tour operator carries such insurance and if it protects the alumni association from being sued directly.

4. QUESTION: How do you protect the alumni association against liability?

   ANSWER: Have the tour agent write this type of clause into the company's master insurance contract so that you will be protected.

5. QUESTION: How legal are rebates from the travel agent to the alumni association?

   ANSWER: They are usually illegal. The way to avoid any questions on the legality of funds coming to the alumni association is to have all money come to the alumni association and not the tour agent. This way you can, in your own bookkeeping, allow for administrative expenses and costs incurred by the alumni association and then pay the expenses to the tour agent and other people who may be involved.

6. QUESTION: How about deaths en route?

ANSWER: You must do two things immediately: Contact the U.S. Embassy or Consulate where the death occurred and call home so that the family doesn't have to hear about it from a news report. If necessary, call your own alumni office and let it relay the message.

7. QUESTION: What do you do about hotels that overbook accommodations?

ANSWER: First, never use them again! Of course, this isn't much consolation when you arrive hot and tired after a full day's travel. Have with you a list of other suitable hotels in each city in case this happens. We suggest that, for these kinds of emergencies, you obtain an American Express credit card with a high credit limit. Perhaps even better, get an International Air Transport Association credit card for air travel with a high credit limit in case you are stuck holding the bag on a charter that doesn't pull through. One can be obtained from the American Society of Travel Agents.

SAMPLE TOUR HOST CHECKLIST

I. PRIOR TO DEPARTURE

A. Welcome aboard letters

1. Send as soon as deposit is received. Enclose deposit receipt.
2. Have tour host sign and include a brief biographical sketch of the host.
3. Mention, either in the letter or in enclosures, further mailings to come, i.e., tape lending library, opportunity for college credit and how to sign up for it, etc.

B. Biographical research

1. Find out birth date, occupation, alumni status, degree, class year, etc., for each participant.
2. Check previous experience with the alumni association, i.e., previous tours, board of directors membership, attendance at alumni-sponsored events, etc.
3. Previous donor information on each participant along with the idea of gift potential in the future.
4. Health problems -- handicaps, special diets or medications, etc.
5. Who doctors are on tour -- find out if they are willing to help in case of emergency.
6. Prepare a short biographical sheet for each participant to fill out on the outward plane trip and then pass around to help all get acquainted.
7. Research and contact foreign alumni in area for the possibility of having them included in a portion of the tour proram while in their country.

C. Procedures

1. Checklist -- find out procedures for:
    a. Reporting illness, accident and/or death of participants.
    b. Contacting local doctors.

c. Lost luggage.

d. Missing people when transportation leaves.

D. Relationship with tour agency and its representatives on the tour

1. Where information desk is to be located, what will be contained at that desk.

2. Late airplanes -- how to handle participants.

3. Entertainment budget:

a. How much, how to obtain, when, where, etc.

b. What to be used for?

c. Necessary receipts?

4. How to handle complaints on:

a. Different quality of rooms

b. Smokers vs. non-smokers

c. Seats on buses

d. Late arrivals

5. Insurance

a. Trip cancellation

b. Baggage

c. Life

6. Local tours (side trips)

7. Incompatible roommates -- how to handle

E. Miscellaneous

1. Assign each participant who volunteers to a research report on some phase of the tour -- report to be given during a bus trip when time permits.

II. ON TOUR

A. Host/participant relationships

1. Hosts should know each participant by name.

2. Host should arrange to have dinner with different tour participant each evening.

3. Do something "special" for each participant couple during the tour, i.e., special meal, memento of trip, special excursion, etc.

B. Appoint special committees for participants

1. "Don't miss the bus" committee (clean up)

2. Complaint committee

3. "Pills and ills" committee

4. Luggage control committee

5. Birthday committee

6. Special events committee

C. Miscellaneous

1. Arrange for a photograph of entire group to be taken somewhere on tour in front of some memorable spot and make a copy available either as a gift or for sale for those who wish it.

D. Design a tour evaluation form to be given as you return home from the tour.

III. POST-TOUR ACTIVITIES

A. Arrange for a reunion of tour participants three to six weeks after the tour returns so that the people can share their slides with one another.

BRIGHAM YOUNG UNIVERSITY ALUMNI TOUR DIRECTOR'S GUIDEBOOK

INTRODUCTION

BYU Alumni Tours and Expeditions are sponsored by the Alumni Association in an attempt to involve alumni in a meaningful and worthwhile travel experience, build alumni loyalty and support of Brigham Young University while providing a group atmosphere totally in compliance with BYU/LDS standards.

GENERAL ORGANIZATION

The Alumni Association operates all Alumni Tours and assumes full responsibility for their operation. All tours must be approved by the Executive Director of the Alumni Association.

I. PLANNING PHASE

A. Proposals for alumni tours are accepted from any source. All tours are centrally coordinated through the Business Services Division of the Alumni Association. The Alumni Business Manager handles the following assignments in this phase:

1. General conceptualization, generally done in consultation with the Travel Management Team.

2. General planning (up to proposal stage):
   a. Develops itinerary
   b. Selects dates
   c. Determines general cost estimates
   d. Determines number that can be accommodated
   e. Determines mode/methods of travel to be utilized
   f. May determine possible options for participants
   g. Determines number of staff necessary to conduct tour

3. Draws up first draft of proposal. This draft will contain a set of testable objectives of what will be accomplished by this tour.

4. Presents first draft to executive director for tentative approval.

II. TENTATIVE APPROVAL PHASE

A. First the draft proposal is presented to the Executive Director of the Alumni Association for approval to proceed to the next phase. Proposal is judged on the following basis:

1. Does it meet general purpose of Alumni Association?

2. Does it support the Alumni Association and the university?
3. Will it "sell" based on experience and best judgment?
4. What is the general response from the university administration at this point -- mostly to keep them informed of what is developing.

III. BID PHASE (For tours only)

Once the proposal is approved, then the alumni business manager prepares a technical bid which is sent to, at least, all tour agents in Utah County.

IV. FINAL APPROVAL PHASE

When bids are opened:

A. The alumni business manager:

1. Prepares comparative bid sheet
2. Makes recommendation of bid to accept
3. Makes necessary adjustments to itinerary
4. Adds into bid cost the appropriate items to be provided by the Alumni Association, such as:
   a. flight bag
   b. tickets to games
   c. tour directors costs
   d. promotion costs
   e. other costs
   f. retained earnings
   g. administrative costs
5. Develops budget for tour
6. Prepares final draft of proposal which is presented to the executive director as a recommendation for action.

B. Executive director submits final draft of proposal to university administration (assistant executive vice president) for approval.

V. IMPLEMENTATION PHASE

A. Upon approval of the proposal the executive director of the Alumni Association has the following responsibilities:

1. Selects a tour director, assistant tour director, tour coordinator, and other assistants as necessary from staff.

2. Authorizes alumni business manager to award bid to selected travel agent.
3. Selects academic tour director when appropriate from list prepared by business manager.
4. Periodically reviews progress of tour.
5. Signs necessary contracts.
6. Holds business manager and tour director accountable for successful tour operation.

B. The alumni business manager has these responsibilities:

1. Trains a tour director.
2. Manages tour budget.
3. Sets up and schedules all payments.
4. Prepares budget reports.
5. Supervises tour organization arrangements.
6. Pays all bills.
7. Supervises the sending of statements.
8. Prepares travel advance for tour directors.
9. Distributes travel advances and other funds to tour director.
10. Prepares cost breakdown for each item of tour.
11. Coordinates preparation of travel reimbursement forms after tour.
12. Handles all collection problems.
13. Prepares final accounting after tour.
14. Works with alumni publications editor and tour director to develop and distribute appropriate promotional material.
15. Carries out administrative details related to tour organization.
16. Approves with executive director the wording in the official brochure.

17. Deals directly and primarily with travel agents on all operational items, i.e. optional tours offered, itinerary adjustments, etc.

18. Handles all liaison with alumni director.

19. Is the only person on tour staff authorized to deal directly with the tour agent until tour departs.

C. The tour director has these responsibilities:

1. Assumes major role in tour operations and management.

2. Coordinates with alumni business manager all items having to do with group organization, arrangements, facilities, programs, itinerary adjustments, brochure preparation, promotion, handout materials, pre-tour lectures and other functions, on-tour firesides, receptions, church activities, etc.

3. Serves as a "nerve center" for all communication related to the tour, i.e. letters, questions, news releases; develops and supervises distribution of all information to participants, welcome aboard letters, checklists, etc.

4. Supervises sale and/or distribution of flight bags, luggage tags, name tags, etc.

5. Prepares final itinerary.

6. Handles housing and plane seating assignments (pre-assigned notified).

7. Assigns assistant tour director and tour coordinators, specific duties with alumni business manager and executive director of the alumni association.

8. Trains assistant tour directors, tour coordinators, and assistants.

9. Consults with academic director (when appropriate) on itinerary adjustments and tour operations.

D. The academic director sometimes also serves as the tour director:

1. Is chosen by executive director upon recommendation of the business manager.

2. Provides assistance in planning itinerary.

3. Prepares all pre-tour educational materials relating to tour (i.e. suggested reading lists, handout sheets for participants, etc.)

4. Assists in pre-tour lecture series, if held.

5. Prepares and presents educational programs on tour.

6. Cooperates with tour director in setting times, places, and facilities for on-tour educational presentations.

E. Assistant tour director has these responsibilities:

1. Assists tour director with all necessary preparation related to tour.

2. Assumes tour director's role in his absence.

3. Usually also fills role of tour coordinator as well.

F. Tour coordinators and assistants have these responsibilities:

1. Assist tour director in operation of tour.

2. Usually they are responsible for specific group of tour participants.

3. Organize assigned groups according to wishes of tour director.

4. Act as conduit of information from tour leadership to participant and vice versa.

G. Tour agent has these responsbibilities:

1. Provides contracted services and materials.

2. Handles passports and visas (when appropriate).

3. Handles relations with supplier, i.e. airlines, agents, etc. (Note: Tour agent is the only person authorized to deal directly with these people. While on tour, the tour director must deal only with tour agent unless circumstances warrant otherwise.)

VI. EVALUATION/FOLLOW-UP PHASE

A. Evaluation

1. Immediately upon the return of the tour, the alumni business manager shall meet with all tour directors and assistants to evaluate the specific tour.

    a. how it met the objective as stated in original proposal
    b. things that went especially well
    c. things that did not go as well as they should
    d. things that can be done to make this tour better in the future
    e. an evaluation of tour agent

2. A budget report will be completed and submitted to the executive director as soon as practicable after all financial records are in.

    A critique report will be developed containing pertinent items from both A-1 and A-2 along with recommendations for future tour programs.

B. Follow-up

1. Names and addresses of all participants are to be added to future tour prospect list.

2. A tour questionnaire is to be developed by the alumni business manager and sent to each participant within one week of tour's end. This should be accomplished by a letter from the alumni association thanking them for their participation and encouraging them to join us again. Accompanying this would also be a listing of all future alumni expeditions, alumni tours, and alumni travel study tour, along with dates, costs, and leaders, if available.

3. A tour reunion should be developed by tour director(s) at a convenient time within two-four months after the tour.

TRAVEL LIABILITY

Earle Blackmon
NEC Director of Services

Liability in the area of travel is basically a very grey area. There are few, if any, definitive statements which can be made on the topic. The purpose of this article is to point out some of the areas which are most concern and explore possible ramifications arising from different situations.

SCHOOL LIABILITY

To begin with, one major point should be clarified. Many people believe that a school, because if its nonprofit educational status, has some sort of special immunity. In many states, charitable organizations are granted immunity from suit or liability. However, when a charitable organization undertakes an activity of a noncharitable nature, it may lose its immunity. Although schools are nonprofit organizations, they are not necessarily charitable and, even in those cases where they may be considered charitable, travel programming would certainly come under the heading of a noncharitable activity. Liability, therefore, is very much a concern for schools.

Individual organizations also have cause to be concerned. The idea that only the school and not a part of the school can be held liable is not valid. If a program or activity is sponsored by the school itself then the liability is relatively clear. However, if a program is merely endorsed by the school, the issue becomes muddy. For example, if an official student organization sponsors a trip in its own name, it could be treated as a separate entity in a liability suit because it could be said that although the school endorses the student organization, it is not sponsoring the student organization's activities.

Another example of how the school might become involved pertains to the handling of money. As a protection for the school, it is always best to have checks for travel programs made payable to the company rather than the school or the school organization. Acceptance of funds, even for the purpose of merely consolidating payments to the company or for accounting purposes, could involve the party accepting them in the event of a suit.

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SIGNING CONTRACTS

Who is supposed to sign what contracts and how they are to be signed is a recurring question among travel programmers. All contractual matters involve the Statute of Frauds. Although the legislative restrictions vary somewhat from state to state, the Statute requires certain types of contracts to be in writing and limits the instances in which one can go beyond the written agreement. The case of Delta Air Lines, Inc. vs. Wilson illustrates a number of important points regarding this.

In this case, Wilson, an official of his company, had signed a contract made between his company and Delta for air travel cards for tickets. He signed the name of his company and underneath it, his name. His signature was preceded by the word "By" and followed by the typewritten word "personal." When the corporation went out of business and couldn't pay for the tickets, Delta sued to collect from Wilson. Their contention was that the word "personal" following Wilson's signature meant that Wilson intended to guarantee payment. The court rejected this based on the Statute of Frauds. Under the Statute, one cannot go beyond "the four corners of the contract" to prove intent. In other words, intent must be figured out based solely on the text of the contract unless some exceptional circumstances exist. Delta then contended that Wilson became personally liable when he signed the contract as he did. The court pointed out that "the signature of a corporate officer placed under the name of the corporation and preceded by the word 'By' does not create personal liability."

If the way a contract is signed (for example, a double signature by the same party, etc.) muddies the meaning of the text of the contract, then it is possible to use outside documentation to prove intent because the contract would be ambiguous. Delta argued that the word "personal" made the contract ambiguous, but the court again said no. If the parties to a contract are clearly stated in the text of the contract, an individual cannot become a party to the contract merely by signing it. An official of a corporation who signs a contract cannot be held individually liable unless he signs individually as a party to the contract and this was intended. The parties to the contract as stated in the text of the contract are known as disclosed principals; they are the ones who are primarily liable because they are the ones who are primarily responsible for the execution of the contract.

The important point to remember about this case is that, although the text overrides to some extent how a contract is signed, the exact language in the contract and the way it is signed, is often the key in determining liability.

CHARTER CONTRACTS

A relatively recent change in the signature requirements for charters resulted from a liability suit against a college. In the past, when a school or organization entered into a charter contract, the contract and the Statement of Supporting Information (a document attesting to the fact that CAB regulations had been adhered to in setting up the charter) had to be signed by both the campus organizer and an officer of the school. Now, however, only one signature, that of the campus organizer, is required.

When the crash of the Wichita State University football team occurred, the state of Kansas was sued (and held to be responsible) partially based on the fact that the officer of the school who had signed the charter contract was a representative of the state since Wichita is a state university. It was not the CAB's intention to involve a state financially by requiring a school officer's signature on a charter contract, but only to reinforce the fact that a flight had been set up properly, so the requirement was dropped.

TRIP LEADERS

When a school or organization sponsors a travel program it will often have someone go with the group to take care of administrative details and help coordinate the group's activities. This person's position and the capacity in which he acts can be a crucial point in a liability suit. Unless an official representative of the school or organization accompanies the group in the capacity of a supervisor to insure that the members of the group follow the trip guidelines established by the organizer, the sponsor may be directly accused of negligence in the event of a mishap.

If a mishap occurs and this official is present, the sponsor will be able to say that it discharged its responsibility and this can greatly mitigate the sponsor's liability. It is not the supervisor's responsibility to baby-sit the group but rather to see that the travelers are aware of and abide by the conditions of the trip. For example, if a change is made in a bus departure time, it may be his job to be sure that all members of the group are informed of this so they will not be left behind. It is not necessary for the official group supervisor to be the one who personally takes care of all the administrative details (like baggage checks, hotel check-ins, etc.) that a trip leader usually handles. Anyone the sponsor wishes may be sent on the trip to take care of these responsibilities. However, the official supervisor must be present to insure that the sponsor's obligations are being met.

It is important to note that the official supervisor must be someone to whom the school has specifically delegated authority to act in the name of the school in a particular capacity. For example, just because a faculty member is appointed advisor to a campus group, it does not necessarily mean that he has the authority to sign contracts in the school's name for that group's programs. By the same token, if a faculty or staff member happens to be part of a group on a school trip, the sponsor's obligation to have an official supervisor accompany the group is not satisfied unless the faculty or staff member has been given the authority to represent the school in that particular type of situation. It is obvious from the preceding statements that a student could not be the official supervisor except in the highly unlikely event that the state (in the case of a state school) or trustees (in the case of a private school) permitted the school to delegate legal authority to someone who was not an employee of the school. A student could, however, be responsible for carrying out the administrative duties of a trip leader.

BROKEN LEGS AND OTHER HEADACHES

Discussion of a trip leader's responsibility in specific situations -- such as a student being in a hospital or in jail when the group is scheduled to leave, or having to return earlier than the group, or missing a flight -- would be too lengthy to be included here and is better left for another article with the exception of a few points. Basically the trip leader's greater responsibility is to the group rather than to the individual. With this guideline in mind, if he also makes every effort to assist the individual where possible, the trip leader or official supervisor will have fulfilled his obligations.

If a member of the group misses a flight through no fault of his own or has to go to a hospital, determining who is liable for what can be time consuming. Therefore, it is best for the traveler to be prepared to deal with these situations himself while the question is being legally determined. In the case of a missed flight, an airline has the prerogative of filing for special permission to transport the person to his destination at no additional cost. However, this can be time-consuming also. The safest thing for the traveler to do is to purchase flight insurance, at a cost of about $7, which will cover the cost of his one-way or round-trip ticket if he misses his flight or has to return early, etc.

As preparation for an unexpected trip to the hospital, the traveler should check on his existing insurance coverage to see if it is valid in the area in which he will be. If it is not, he may be able to purchase a rider for his existing policy or he can simply purchase a special policy solely for the trip at a low cost. In any event he should be sure to have all necessary information -- such as company name, policy number, amounts and type of coverage -- with him on the trip, not back home on his bookshelf!

One final caution to trip leaders: When a problem occurs, do everything you can to handle it on-the-spot or at least be sure that you take whatever steps are necessary to legally protect yourself or your organization in the event a claim could arise later. Some travelers may not be innocent bystanders. For example, a woman on a tour refused to sit down in a bus and when the bus hit a big bump she fell down. Nothing was said until, at the very end of the trip, she began complaining often and loudly to the other travelers that her back hurt. The trip organizer immediately went to the expense of calling in doctors to examine the woman but she refused. If the woman had tried to bring suit against the organizer, this refusal probably would have saved the day for the organizer. However, if he had not gone to the expense of bringing in the doctors or had waited until the group returned to the States, a huge, expensive lawsuit could easily have been the result.

WAIVERS

The question of the efficacy of liability waivers or responsibility clauses is one of the thorniest in the area of liability in travel. Basically it could be said that a responsibility clause delineates the responsibilities of a school, retailer, tour operator, wholesaler, ground operator or airline to the traveler. Practically, however, responsibility clauses are almost always "non-responsibility" clauses because they state what the party feels is not his responsibility to the traveler. They can thus be considered to be waivers, even though they may not be signed.

A waiver is characterized by the courts as a covenant not to sue. The intent of all waivers is to exempt the party dealing with the traveler from liability. The wording or language used excuses the party from liability and is therefore called exculpatory. A waiver is thus an exculpatory contract. The appellate court of Westchester County (NY), in an opinion by Justice Wenzel in 1959, said that waivers "are not looked upon with favor by the courts, are strictly construed against the party relying upon them, and clear and explicit language in the agreements is required in order to absolve the promises from liability." This court also said that waivers are generally enforceable but the precedent cases upon which this opinion was based dealt with non-travel circumstances or with free travel and not with travel by a paid passenger on a group trip; therefore, the application of this opinion to paid group travel may be questionable.

KAUFMAN VS. AMERICAN YOUTH HOSTELS, INC.

The case of Kaufman vs. American Youth Hostels, Inc. is significant because both a state supreme court and a court of higher authority, the state's court of appeals, struck down a defense based on a waiver. A 15-year old girl participated in a tour conducted by American Youth Hostels which included climbing Mt. Hood in Oregon. The group fell down the mountain, and the girl died as a result of her injuries. Her father, in the two separate legal capacities of an individual and of the administrator of his daughter's estate, sued the company on the grounds of negligence.

Prior to the tour both the girl and her parents had signed a waiver releasing the company from any liability. As with all waivers, the wording was sufficiently broad to cover almost anything within human imagination. For example, it said, in part: "I hereby release American Youth Hostels, Inc. and its agents from any and all responsibility or liability of any nature whatsoever for any loss of property or personal injury occurring on this trip or any substitute trip under its management."

The courts ruled that the father could sue as executor of his daughter's estate but not as an individual (parent). Because the wording in the waiver was in the first person singular, it was ambiguous as to whether the waiver covered the right of the parents to sue. The court felt that it could be argued that only the girl was agreeing not to sue and that the parents' signature could be interpreted as merely granting permission for their daughter (a minor) to participate in the trip. This is an important point to consider since many schools require parental permission for students to participate in activities such as athletics or trips involving athletic or recreational activities. Are the "waiver forms" your school uses actually liability waivers or merely parental permissions for participation in a trip or activity?

A second point of contention regarding the wording of a waiver was brought out in the Kaufman case. In attempting to exculpate themselves and anyone related to them from any conceivable liability by using extremely general wording in the waiver, AYH had neglected to specifically excuse themselves from their own negligence. Although the court held that the language was sufficiently broad and explicit for it to be assumed that the waiver was intended to cover negligence, the fact that this was a point of contention in the case should serve as a warning. Be sure that your school's waivers are both broad or general enough to cover unusual or unforseen occurrences and specific with regard to those things which are more likely to occur or from which you are most concerned about being protected, such as loss of property, injury or death due to negligence.

MAIBRUNN VS. HAMBURG -- AMERICAN LINES, INC.

Although the Kaufman case raises many questions about the validity of liability waivers, there is another case which raises the perhaps more important question of the circumstances under which a traveler can be held responsible for knowing the contents of a waiver. The case of Maibrunn vs. Hamburg -- American Lines, Inc. was decided in 1935.

Maibrunn bought a ticket for an ocean voyage on a steamship of the Hamburg-American Lines. On the face of the ticket was the following: "Notice. The attention of passengers is especially directed to the terms and provisions of this contract printed on the reverse side, which must be signed by the passenger and the agent." The back of the ticket contained a clause which required any claim against the company to be filed in written form with a full explanation of details within 60 days after the end of the voyage. On the voyage, during a 40-miles-an-hour gale, Maibrunn was looking at the sea through a glass window when a wave hit the glass, shattering it and critically injuring him. He sued.

The steamship line based its defense on the above mentioned clause, contending that Maibrunn could not sue because he had not lived up to the terms of the contract by failing to file his claim in writing within 60 days of the end of the trip. The case was not decided, however, on the validity of this requirement but rather on whether or not Maibrunn could be held responsible for knowing the contents of the clause.

The outcome of the case established the principle that a traveler cannot be bound by a restriction (or waiver) at all without actual knowledge of its contents -- in other words, unless he sees it. This means that unless this first requirement is satisfied, whether or not the clause or waiver itself is valid becomes a moot point.

With regard to the placement of the clause, the court stated: "A passenger is bound by all that is in the contract itself; in order to charge him with other stipulations they must be incorporated into the body of it (i.e., the contract), at least by reference. A mere notice on the front of the ticket, which is not part of the contract, charges him only if he sees it in season." Thus the position of the waiver or notice of responsibility and the obviousness of the statement calling the traveler's attention to the waiver are important points in determining the efficacy of these clauses. Practically, this means that: 1) a participant in a school travel program should be required to sign a document stating that he has read and understands the waiver, and 2) the waiver should be near or at the signature on the same side of the paper and should be in prominent type.

The final and most important point that should be made here about waivers is that it is a basic tenet of the law that a party cannot contract away his legitimate liability. Just as a contract to commit murder is not a legal contract, an individual cannot, through an exculpatory contract, relinquish one of his inalienable rights -- the right of redress for injustifiable grievance committed against him through no fault of his own.

Waivers are used with the intent of forestalling unreasonable or unjustified claims. For instance, there have been cases in which an individual tried to sue a tour company because she found a frog in her bed or because a male employee on tour, the brochures for which emphasized the employees' neatness and continental appearance, didn't shave.

SETTLEMENT OF CLAIMS

An insurance company's willingness to settle a claim may not depend on the sponsor's actual liability. It more often depends on the relative cost of paying a reasonable settlement when the claimant has a good case as opposed to the cost of lengthy, costly litigation. An important factor which contributes to this willingness to settle just claims out of court is the fact that litigation against members of the travel industry is full of uncertainty because the trade's liabilities to clients are not clearly defined.

BROCHURE WORDING

The language used in waivers is not the only wording problem travel programmers have to worry about. Sponsors may also be liable for damages based on what is stated in their program brochures. In the case of Stevenson vs. Four Winds Travel, Inc., a tour wholesaler was sued because of the express and implied promises made in the tour brochure. The brochure contained statements such as "your escorts ... know precisely what you will be seeing and doing every day." " ... they've been there before." "They can tell you ... anything at all. They know all the answers." " ... to supplement the knowledge of your tour escort, we use professional local guides. They know out-of-the-way places the casual visitor may miss ...," and passengers will be "cared for." These copyrighted brochures listed nine "good reasons" for traveling with Four Winds, one of which was: "Guaranteed fully escorted from start to finish."

In stepping from a boat onto a wet and slippery dock, an elderly woman on the tour slipped and fell, fracturing several bones and injuring her spine. She sued.

Since Four Winds was not the owner of the dock or the lesee of the boat or the operator of the tour, ordinarily they would not have been liable since wholesalers are generally not held liable for acts or omissions of suppliers. However, in this case, the court ruled that Four Winds could be sued because of the unusual wording in the brochure. The court especially pointed out the type of far-reaching statements in the brochure like those previously quoted. The court even consulted a dictionary to determine the meaning of "care" and noted that it meant to "watch over" or "guard."

In the final analysis, the elderly woman lost her case because the court ruled that a wet, slippery dock constituted "a clear and present danger" which she could or should have been aware of and taken the necessary precautions, even though she had never been there before and was to be "cared for." This decision and the reasons for it do not, however, affect the major import of the case. If the accident had resulted from something other than "a clear and present danger" she probably would have won her suit.

The lesson to be learned is this: In your attempts to sell prospective participants on the advantages of your programs, don't promise too much. You may become liable by virtue of the extraordinary claims, promises or guarantees -- expressed or implied -- which you make in your promotional material.

WHOM DO YOU REPRESENT?

A travel agent's or a school's liability varies according to whom he represents. For example, when a travel agent sells an airline ticket he is acting strictly as an agent for a particular carrier. He is, in effect, merely processing paper and thus cannot usually be held liable. Because he is only acting for the airline, the liability is the airline's. BUT when a travel agent puts together a combination of arrangements for a client, he becomes a broker for numerous firms and is acting more as an agent for the client. He is also acting as an agent for the client rather than an agent for a firm when he counsels a client on, for example, the relative advantages or disadvantages of different carriers, tour operators, hotels, etc. In these two cases the liability changes; the client may hold the agent (or the school) responsible.

In general it may be said that the greater the service and professionalism and the higher the expertise, the greater the vulnerability or possible liability in legal matters. It should be noted, however, that in this particular context, the extreme converse of this statement (i.e., that ignorance will excuse someone from liability) is not valid.

In the Maibrunn case discussed previously, the responsibility clause was signed for Maibrunn by the agent who sold him the steamship ticket; Maibrunn himself never signed it. This had an effect on the case because the court ruled that at the time the agent signed the responsibility clause for Maibrunn, he was acting as agent for the steamship line. If the court had ruled that he was acting as agent for Maibrunn, then the steamship line could have held Maibrunn responsible for knowing the contents of the responsibility clause. Maibrunn could then, however, have sued the travel agent due to the fact that, since the travel agent would have been acting as agent for Maibrunn, it would have been his responsibility to inform Maibrunn of the contents of the clause.

LIABILITY INSURANCE

Since it is virtually impossible for a school, company, organization, or individual to protect themselves completely from liability by waivers or other documents, it is always a good policy to carry liability insurance. The mere fact that someone has liability insurance has nothing to do with a determination of whether or not he is liable in any given situation.

There are four basic types of major liability insurance policies:

1) Third party liability insurance protects you against someone else's error.
2) Errant omission coverage provides protection against liability resulting from an employee forgetting an important detail or making a mistake.
3) A 3-D policy covers dishonesty, destruction and disappearance.
4) Insurance which covers liability incurred by traveling employees who accompany tours is also available.

The Insurance Information Institute lists 50 companies that write travel liability policies; however, two firms write most of them. They are: American Home Assurance Co. whose broker is C.B. Beardsley Co. of Garden City, N.J., and American Motorist Insurance Co. whose broker is S.A. Van Dyk, Inc., of Chicago. These two firms offer worldwide coverage on incidents from which a suit might result. There are two sections in these policies. The first covers personal injury or property damage connected either with business operations or acts of third parties and the second covers liability for financial losses to clients due to your own mistakes or negligence. Considering the risks involved, the cost of these policies is not great.

In the event a school or organization does not or will not carry liability insurance, individual travel programmers or trip leaders may want to consider getting a rider on their homeowners' policies which will protect them from the same types of liabilities outlined above. The cost of these riders is very minimal. If you are dealing with an airline contract, another alternative is to get the airline to name the school or organization as a co-insured or additionally-insured party in the airline's insurance policy covering the trip.

IN CLOSING

If many of the points in this article seem to be somewhat hazy and fraught with contradictory implications, then I have succeeded in my purpose -- to create an awareness of some of the unanswered questions that exist regarding liability in travel.

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COME BACK LOADED WITH HONEY

Harold Glen Clark

Travel involves transporting yourself to a different environment from that in which you now are.

Travel means a change of environment on the theory that you will learn or acquire something you did not have before. It is a good theory. Seeing different scenery, people, and cultures and tasting a different diet increases the chance that you will acquire new appetites, new knowledge, and new attitudes.

Let me point out a few things you should get for your travel dollar. After all, you are paying out hard-earned cash for certain concepts, ideas, experiences, and feelings, which you hope will come to you while you travel under the sponsorship of a university. It was Colton who said, "Don't return home with heads as empty as your pockets -- with traveled body and untraveled mind." Haliburton, the great world traveler, came directly to the point of what I wish to say when he commented: "The bee, though it finds every rose has a thorn, comes back loaded with honey from his rambles and why should not other tourists do the same?"

What is the honey that you as a traveler wish to bring back? I dare say many of us have not carefully thought through the maze of expected experiences which race around in our brains as we prepare to travel. Much time is spent deciding whether to take two pairs of shoes or one. This is important, but not nearly so important as giving priority to where these shoes are going to take you and how to think as you stand before a statue or a castle.

There will be many new and exciting things for the inquisitive mind. Someone has said, "A traveler without observation is like a bird without wings." This is because he has no imagination; he lacks the spirit of inquiry. He is the one who looks at Michelangelo's marble statue of David without understanding or deep feeling, and then when he gets home and reads about it, he yearns to go back so that he can see this great work of art with new eyes. After our visit to Fontainbleau where Napoleon lived, I heard more than one person whisper, "When I get home I'm going to read a good book about Napoleon if it's the last thing I do." They received only half as much for their travel dollar that day as the person who had already read that book!

Clark is Dean Emeritus of the Brigham Young University Division of Continuing Education.

Here are a few guideposts that may help you prepare for study and travel abroad:

1. Know locations. A simple road map will do. Where is France? Is it the same latitude as Utah? Mark your map so that you can tell yourself and others where you are and where you have been. Read your son's or daughter's elementary geography book if you do not have anything else. It will help you. Flying over the ocean will mean much more to the person who knows his oceans. Below you is more than water; it is a mirror. It can be beautiful, serene, or have huge angry waves. Which is the largest ocean? What is the difference between a sea and an ocean? How deep is it? What makes it blue? Where are its great currents? How do these currents influence people's lives? What animals live in the ocean? How long did it take Columbus to cross the Atlantic? If you answer only a few of these questions you are rich in knowledge and because you are rich you will be made more rich. Many of you have heard the quotation from the inscription on the Union Station in Washington, DC: "He who would bring back the wealth of the Indies must carry the wealth of the Indies with him. So it is in traveling. He who would bring back knowledge must carry knowledge with him."

2. Know the simple facts about the towns and countries you will visit. An ordinary encyclopedia such as the World Book or Compton's has most of the fundamentals on population, size, weather and other chief characteristics. The encyclopedia is your friend; it is generally more accurate than European guides or the native you talk to on the street. Invest in a small plastic pocket loose-leaf binder and type or pencil in it the information you find. Carry this little abridged loose-leaf encyclopedia with you, leaving room to make additional notes as you ride the canals of Amsterdam or walk the broad streets of Paris. You can become, through this method, an informed enthusiastic observer.

3. Know a few facts about the economics of each country. How do people earn a living? What keeps the community going? What wages are paid to your maid, your taxi driver, the merchant, the school teacher? You should know the franc, the shilling, the krone and their equivalents in U.S. dollars and cents. You will get a liberal education trying to convert the American System of measurements in pounds or quarts to the metric system. Get your director to recommend a good book on European economics. Read, study, and read!

4. Know the kinds of government you see in operation. Are they independent, self-governing, and strong? Are the people under this form of government industrious and virtuous? We will not discover these facts unless we are alert and objective

observers. Do the people love liberty? What is the death rate? Standard of living? You will never appreciate your own government in terms of the number of ratios, the literacy rate, the number of great leaders, and other evidences of its strengths and weaknesses without observing other governments.

5. Know a few greetings in each language. People who speak in their language have a surer way to get the spirit of a culture and to make a favorable impression with people in foreign lands. Since you may not be able to learn all languages, learn what you can: "Good morning," and "Goodbye," in French, for example. Learn how to count in German or to read the road signs. You will find it especially useful to know the difference between the words "men" and "women" when you are looking for a rest room! Obviously the foreign language student will get more from travel than one who speaks English only.

6. The religions of other people are always of interest. Countries are usually proud of their churches. You will see many, but they will have no appeal if you do not know something of the story of the great religions of the world. Do you know the difference between Baroque and Gothic architecture? Know something about Sir Christopher Wren, the architect, when you go to London or about the Pilgrims when you see the church where they worshipped in Holland. In the midst of the guide's lecture about the great men who lie buried in Westminster Abbey, one of our tourists interrupted his talk with, "Hey, look, there goes a Chevrolet!" St. Augustine said, "The world is a great book, of which they that never stir from home read only a page." When you stir from home make sure your interest includes the Chevrolet and more. Know something about the rise of the Anglican church and then, as you tread the cobblestones of the castle of King Henry VIII, the light in your eye will make you forget the blister on your heel.

By now, you are no doubt ready to throw in the sponge and say, "I guess I won't travel. You can't learn everything -- and there is so much to learn that I give up." It is true that there is much for one to learn. Actually, the traveler should start in the first grade to prepare for his or her foreign journey. In effect this is what many have done. All that needs to be done further is to recall what is known and to reorganize information and concepts into categories useful to the travel study program. You should especially review this information in light of your travel itinerary. If you are visiting Stratford-on-Avon, a few minutes spent now reviewing the life of the greatest dramatist the world has ever known, the finest poet who ever wrote in the English language, whose verse is more widely read in all lands than anyone else, will make this visit far from dull or mediocre. What was Shakespeare's greatness? What words coined by him are used today by millions? What are some of his famous quotations? Answer just a few of these questions and his home, his tomb at the little Holy Trinity Church on the banks of the Avon, will become shrines and live in your memory forever.

7. If you have a hobby, ride it while you travel. One person likes heraldry. Heraldry, as you know, is a system of symbols by which families and lineage are identified. It is really a science now, with four parts of armorial bearings. When you know these, you understand the coats of arms that appear in the castles and in shops and the marks of cadency and their meanings. You study the road signs that have been internationally adopted, or collect dolls from each country. One of my students collected mechanical toys typical of each country. This was a way she wanted to spend her money. I can see her now getting off the boat with a caged mechanical bird that sang like a canary when it was wound up.

What I have tried to intrigue you with is really a point of view. Pack your nylon underwear in your suitcase with care, see that your camera is working, and that your passport is faithfully guarded, and you will have done well. But do not forget your attitude. Dress it up and pack it as carefully as you did your passport. Robert Louis Stevenson said, "To travel hopefully is a better thing than to arrive." I wish we could help each of you to soften your prejudices and liberalize your mind for the experiences ahead.

Tuckerman must have had just such a tour as yours in mind when he said, "To be a good traveler argues for being no ordinary philosopher. A sweet landscape must sometimes atone for an indifferent supper, and an interesting ruin charm away the remembrance of a hard bed." Why do you go abroad? Is it not to eat an open-face Danish sandwich? Is it not to sleep on the unusual mattresses and try the European plumbing? Is it not to see what government and religion have done for a particular people? All the world is open to the traveler with a teachable mind. If you have the ethnocentric mind which says that everything American is best, you are already off to a bad start. Adjust your mind as you adjust your cameras. Remember, too, that each race adapts and shapes its own patterns of life. Each has flaws, but be determined that you will not let these destroy your sense of appreciation. "God hath made of one flesh all nations of the earth."

8. The last point I wish to stress is what happens when you return home. I hope you come home with your mental and spiritual baggage bulging with new concepts. If you stuff your suitcase with pre-arranged prejudices, then your case is full of junk. Be sure to tuck into your bag the memory of that sunset on Lake Lucerne, the smile of the little Dutch girl in wooden shoes, the scene of that German family raking hay on that bright sunny afternoon. This is the honey which the bee gathers -- these are the precious gifts of travel from those who have eyes to see and ears to hear and a heart to understand.

Finally, do not bore fireside groups and your friends with 200 slides. Show 25 of your best with well prepared stories on each and then quit with them liking you. Be modest. "Usually speaking," said Swift, "one of the worst-bred persons in company is the young traveler just returned from abroad."

And so, Bon Voyage, Adios, aug Wiedersehen, and Cheerio!

UNIVERSITY OF MICHIGAN ALUMNI TRAVEL -- OUR SMALLEST SUCCESS OF 1975

Harold M. Wilson
Associate Executive Director
University of Michigan Alumni Association

The University of Michigan Alumni Association, an independent, self-governing and nonprofit organization, is now in its 21st year of alumni travel. By exact count, 24,880 people have invested $24,097,812.25 in 175 official U-M Alumni tours between 1962 and 1982. This is, we think, one of the largest and most successful alumni travel programs in the nation.

For this case study, we focus on just one U-M Alumni Travel undertaking. It was a pioneering effort of unusual dimensions in the travel world which, numerically, might be regarded as "Our Smallest Success of 1975."

In a nutshell, this program was designed to provide no more than 40 University of Michigan alumni with an around-the-world journey concentrating on the Southern Hemisphere and touching five of the globe's seven continents.

The Association wanted to provide a very special travel experience for a self-selected segment of its constituency and to bring foreign alumni together with U-M alumni travelers in distant countries.

EXECUTION. We began planning for this project one warm day in July 1972 in a most unlikely place -- in Moscow on a bus returning from the Gorki Amusement Park to the Intourist Hotel. It was during the U-M Alumni World adventure of 1972, and our thoughts turned to what future travel endeavor might be undertaken by the Alumni Association to equal or surpass the one then in progress.

Before the evening was over, we developed the concept of a totally different around-the-world journey, one to concentrate on Southern Hemisphere destinations. In truth, the itinerary roughed out on paper that night closely approximates the one used some 30 months later.

Other than some preliminary staff exploration of climatic data and airline routings, the Southern Hemisphere project was not actively advanced until a year or so later. Because of favorable results of our 1972 world program, featuring the Orient, Russia and Europe, we offered alumni another one just like it in the summer of 1973.

Then, in the early autumn of 1973, we began to plan more purposefully the ambitious journey we wanted to offer our membership in January and February of 1975. We picked that time following thorough research on the most favorable months to visit each of our destinations. We assembled precise statistics on high and low average daily temperatures, humidity, and rainfall, as well as related information such as the best season for game-viewing in Kenya.

Once we resolved where and when we wanted to go, the next step was to place the project in the hands of a competent travel agency. Often, we encourage two or more agencies to make competitive proposals and select the one thought to be best for our constituency. In this instance, however, we contacted only the agency that had handled our 1972 and 1973 world programs.

Ultimately, then, we had a formal proposal including all the major components -- air, hotels, land arrangements, and the like -- and a net cost to the association per paying passenger, Detroit to Detroit.

This gave the project firmer form but was only a next step. We wanted to provide maximum flexibility and price simplicity -- one price to everyone, regardless of home residence. We also wanted to offer the cost-free ability to travel to Miami earlier than the official departure date and/or stay longer in Honolulu or a West Coast city at the trip's conclusion. These factors involve differing air rates and supplemental air fare taxes. But we resolved them by taking some calculated risks on the composition of the travel contingent, estimating the total additional costs, and then including these in a revised proposal from the agency to the association.

Finally, we thought, everything was firm. Then came the Middle East's October War, the oil embargo, the fuel surcharges, and sharply accelerating air fare costs during the next few months.

A complete chronology through this period is not essential here. We sustained four separate and substantial price increases prior to the announcement of the trip to our membership, which we deliberately delayed far longer than normal for a journey of this magnitude. Indeed, because we were so eager to make certain we could honor the announced price, we reduced our lead time to absolute minimum. By doing so, we maintained constituent credibility by standing firm on the costs.

Next we moved to the all-important phase of communicating with the participants to provide each individual with everything he or she needs to have and to know prior to departure. We attempt this through a combination of personal letters (robotyped, to be sure), informational memos from this office, multiple enclosures, and other items ranging in this instance from a 1,000-page World Guide Book to a personalized U-M alumni flight bag.

PERSONNEL. All activities undertaken by the University of Michigan Alumni Association are under the aegis of Executive Director Robert G. Forman and so, in this overall sense, he was responsible for this program. The bulk of the planning and the implementation was done by Harold M. Wilson, the association's associate executive director and for some years now the coordinator of the U-M Alumni Travel Program. Mrs. Linda Rains ably handled the written communications placed in the mail to U-M alumni travelers.

BUDGET. The total cost of this program was $116,829.56, every cent of which was supplied by the alumni participants. There was no promotion budget needed by the association since our contractual arrangement calls for the travel agency to incorporate promotional costs in the bid proposal. The ultimate financial result of the entire endeavor provided $7,775.00 in new revenue for the association's operating budget. At one time, this would have been considered to be "net profit" for this one program. We now call it an excess of income over expenditures. The dollars are placed in a commingled alumni travel income account, from which on a formula basis we allocate expenditures properly chargeable to alumni travel, such as office overhead, equipment purchase, and a percentage of staff salaries.

SPECIAL PROBLEMS. Other than the continually rising air costs during the planning period mentioned earlier, there was only one special problem. One December afternoon, with the trip booked to capacity and everything seemingly in perfect order, a long distance phone call brought word that Pan American World Airways had cancelled its Flight No. 812 on the leg of the journey which was to carry our contingent of travelers from Bali (Denpasar) to Sydney. This is an overnight flight of 2,872 miles, and airlines make the journey only four times a week.

The Pan American cancellation erased our long-held reservations on the flight and left us with no way to maintain the original schedule. Until the problem was resolved, we did not know where our travelers would spend the night of February 17.

It required six days of intensive effort to explore alternatives, decide on the best course of action, and then secure confirmation that hotel reservations had been restructured in four different cities and that air bookings had been properly altered on three important legs of the journey.

All this was necessary because of our staff conviction that it was essential to preserve the announced three-night visits to both Singapore and Bali. The only way this could be achieved was to reduce the stay in Bombay from four nights to three and then add the extra time to Sydney for a new total of five nights there.

Naturally, after all this was accomplished, we provided a complete explanation to all participants, invited them to study carefully the revised itinerary, and offered a full refund to any who might now prefer not to continue on the journey.

As noted earlier, we planned this trip for a maximum of 40 people; as it turned out, our travel contingent numbered 38.

MEASUREMENTS/RECOMMENDATIONS. Every expression of opinion reaching us from the travelers -- verbal and written, direct and indirect -- has been unanimously favorable. One gentleman even wrote a detailed 39-page story of his experiences, sprinkled generously with enthusiastic praise, and shared this account with his family, his employees, and his Alumni Association. Here's one quotation:

> "About 5:15 a hard rain set in -- not so good, since we had been invited to go to the home of a Michigan alumnus for cocktails with local U of M people. But they solved that for us. Some of them brought their cars to the hotel, and drove us out to the home of Mr. Robert Chen, who is President of the Bank of America, Singapore. A lovely home with beautiful gardens behind (owned by the bank which also owns a number of other homes in the area for their officials). A pleasant gathering, with a greeting and talk by our representative, and response by them, with introduction of all present."

This was one of the six different occasions along the global route where the traveling U-M alumni were able to share a social interchange with their fellow alumni who reside many thousands of miles from the campus back in Ann Arbor.

Other than the $7,775.00 alumni travel income dollars cited earlier, the measurement of program success is of course somewhat subjective. Our conviction that this was truly a rewarding undertaking for all concerned is best exemplified, perhaps, by the decision we've now reached to incorporate another Southern Hemisphere around-the-world journey in our future U-M alumni travel schedule.

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ALUMNI TRAVEL ... MORE THAN A BOONDOGGLE?

Robert G. Forman
Executive Director
University of Michigan Alumni Association

One of the fastest growing activities in the field of alumni programming has been the development of alumni travel. There are two reasons for such rapid growth. One is that it is a program that appeals to alumni and, two, it is a program that appeals to alumni directors. Obviously, people like to travel. In our society, people have the resources, the leisure time, and a high degree of motivation to see new and different things.

The success of alumni travel may seem to answer a very basic question: "Is it a legitimate activity of an alumni association?" I'm not certain that success is the best criterion on which to judge the appropriateness of such a program. We must investigate the philosophy of the program, examine the objectives, and then attempt to determine whether this philosophy and these objectives are being met.

If we are running alumni travel programs simply because alumni are interested in travel, or because we, as alumni directors, are interested in travel, we are missing what I consider the major reasons for such programs. For example, simply to provide the air transportation, hotel, sightseeing, and meals, does not, in my judgment, give us a good enough reason for being in the travel business. Many other organizations can provide those same services. Having alumni leadership accompany trips only to make certain that the baggage is handled correctly, that hotel accommodations are proper, and that "Mrs. Smith" gets aspirin when she has a headache is not, in itself, justification enough for our involvement.

Alumni associations should be in the travel business because they can provide a dimension of service which most organizations cannot. Universities have great faculty resources. These people should be a part of our travel program. No alumni tour should operate under the auspices of an alumni association without an individual from the faculty or the administration of the university taking part. Furthermore, the job shouldn't be only that of a fellow sightseer. The assignment should include opportunities to provide seminars on location, on subjects of academic interest, whether they be directly related to the country visited or not. The faculty or administrator should be part of a program inviting foreign alumni to meet the visiting group and to share in the educational objectives of such travel. The alumni association representative should be along, not only to insure the logistical and service comforts of the trip, but to see that the

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educational objectives are indeed met. Travel programs which do not include such educational services are not, in my judgment, legitimate activities of alumni associations.

Alumni travel can do much more. It can enable the university representative accompanying the trip to address not only our foreign alumni, but their fellow countrymen; and invite to seminars, not only alumni of the university involved in the travel program, but alumni from other American institutions. If the speaker is a figure of some academic stature, there is every reason to believe that graduates of other American universities living in that geographical area would have great interest in hearing what he has to say.

In our travel program, Michigan has tried to involve representatives from American embassies and consulates. I'm well aware that embassy and consular officials have many more invitations to dinners and social activities than they are able to accept. I have found, however, that they will go out of their way to designate at least one representative of their office to welcome the group and to pass on some of his or her observations of the country being visited. This is extremely important. It is important to our foreign alumni to have this opportunity to meet representatives of the United States government.

Obviously, there are some countries where the number of American travelers is simply so great, and the number of alumni association groups going into that country so extensive, that it would be impractical to invite all alumni of American universities to attend every single presentation or seminar given by a faculty member or administrator from the visiting university. However, depending on the qualifications and stature of such individuals, this could be coordinated in such a way that people could simply pick and choose the programs they might like to attend, and these opportunities could be made known to our foreign alumni. And I'm of the opinion that it would be of great value to them, as well as to the relationships between our two countries.

When faculty members accompany alumni travel groups, one major way of utilizing their services fully is to prepare alumni travelers prior to departure. Faculty members could prepare and alumni associations could distribute recommended reading lists of books available from local book stores.

Another important service is to bring people together prior to departure for a series of lectures about the area to be visited so that they have a fuller understanding of what they can see, what they should be looking forward to doing, what is available to them, and what can be learned through some type of intensive preparation.

These things, of course, take more time, and may even add to the expense of the program, but they are clearly the things that make alumni travel different from ordinary travel abroad.

They are the reasons for our being involved in travel programs. The advantages of travel programs are many-fold. The alumnus is better educated as the result of the trip. He has a better feeling toward both the association and the university because they have offered this unique travel experience. He sees the association as something beyond just offering good times. The alumnus is reoriented toward his university and has a new type of motivation for wanting to be connected with the alumni association and the university.

The travel program offers a tremendous opportunity for alumni administrators to talk to the group about other programs. In my alumni travel programs, I have found people who volunteer to give leadership to their reunion activities, to their local club activities, people who have signed up for our alumni family camp, and people who have indicated their willingness to serve on committees and boards of the alumni association. Very few University of Michigan Alumni Association trips are concluded without at least one prospect being identified during the trip as a potential major donor to the university. I do not think we should be in any way ashamed of such endeavors. They are a legitimate and primary objective of our travel program.

And travel promotes involvement or reinvolvement among groups. One is obviously the younger alumni whom we have real difficulty in reaching until they're out of school for a number of years. The other is the older alumni who have been active in their middle years but tend to move away after they feel that their service roles are completed. Obviously, the older alumni are attracted to our travel programs. They have the time and resources, and travel is a way in which we can rekindle their interest.

The younger group is something different. They have limited resources, limited time, and, in general, prefer to travel abroad, if they have the opportunity, in some less organized way. But younger alumni can be attracted to what I consider to be more adventuresome travel programs: backpacking, for example, or travel within the United States, or ski trips which also utilize the opportunity for evening seminars -- activities which are perhaps a bit more physical than our standard tour programs and less expensive, but still retain some educational objectives. If this kind of service can be provided to young alumni, I think they will respond. Once their interest is aroused, it is up to us to capture them with more creative and imaginative programs.

We should view our travel programs as part of our overall program. It should not be "the tail that wags the dog," but a part of a well-balanced program of services to, and activities for, alumni. First and foremost, we are in the alumni relations business to serve our institutions. At the same time, we must understand that we are also in business to serve alumni. Some of our programs may seem, at first glance, not to have a direct benefit to the university. However, programs which make our alumni highly-motivated and appreciative will in turn engender support and service to our institutions.

PLAY THE AIRFARE GAME AND SAVE YOUR MEMBERS MONEY

Susan Mitchell Bistline

Decontrol has caused radical changes in the way airlines operate and in the way consumers -- particularly business consumers -- make arrangements to fly. The shift in government policy to allow carriers to set their own routing and fare schedules has changed the focus from an industry that based its services on actual costs to one characterized by intense competition. This deregulation hasn't resulted only in lower fares. It has also changed how those fares are arrived at and who sells the ticket.

Although this ardent wooing of customers by airlines may be only temporary, it's still good news. Association executives generally agree that the rapid rise in the cost of air travel in the recent past, which was due in large part to escalating fuel costs, has had a negative effect on attendance at meetings and conventions. Even those who don't totally agree with this assessment see the benefits of lower air fares.

Martha Krafton, director of conventions and exhibits of the National Office Products Association, Alexandria, Virginia, explains: "If people make up their mind they want to go to a convention or a meeting, they'll go. Fifty dollars more or less on an airline ticket isn't going to make a difference to these individuals. But I think our being able to offer our members lower airline fares to our convention in Chicago last year definitely helped some people make up their minds to go. If you want to use reduced airfares as an incentive to help your members, the opportunity has never been better."

DEREGULATION AND FARE WARS

In 1978, when deregulation of the airlines began, fuel costs were still escalating. So were ticket prices. But the freedom to go into new cities and to start up new airlines caused a rush of expansions that resulted in fierce competition for those markets. No longer did one or two carriers control most of the seats to certain cities. The race was on.

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Then came the Professional Air Traffic Controllers Organization strike and the resulting Federal Aviation Administration restrictions on flight schedules. Sure, there were a lot more airlines out there serving a lot more cities, but new FAA regulations called for a spreading out of flights and a cutback on the number of flights that could leave one place at one time to ease the burden on the air-traffic-control system. The resulting panic among passengers eventually died down when they realized that there were enough seats -- sometimes more than enough.

In the fall of 1981, the Civil Aeronautics Board changed the flight tariff rules so that airlines now must file only their maximum fare from one point to another and can forego the normal 30-day waiting period before putting any fare changes into operation. Airfares can be, and are, changed within hours.

Lest you think this an exaggeration, consider the signs springing up on travel agency walls that only guarantee the price quoted at the time it is quoted or at the time the ticket is purchased. Things move too fast for any other type of understanding.

Most knowledgeable travel agents don't even trust the latest computer fare listings; they call the airlines to see if there have been any last-minute changes. In a market so volatile, where it's even hard for travel professionals to keep up, how can association executives turn the situation to their advantage to help their members?

First of all, you can help your members by becoming aware of the situation, realizing that the airlines want and need your business more than ever, and by staying flexible enough to seize opportunities as they arise.

YOU'RE IN THE DRIVER'S SEAT

The simplest way to help your members with travel costs is to make use of existing fares. Peggy McCollum, executive vice president of the Florida Society of Association Executives and president of McCollum Management & Meetings, Tallahassee, Florida, gives an example.

"Airlines in Florida have special fares on special flights," she says. "For short meetings, we check these fares as well as the availability of air service at certain times. If there is a special fare for a noon flight, we schedule the meeting for 2 p.m. instead of 10 a.m. so our members can take advantage of the lower costs."

She also tries to get registration forms out early enough for her members to take advantage of supersaver fares. In addition, she says, it's sometimes cheaper to take a night flight and pay for a hotel room than to take an early morning trip at regular coach fare.

Sometimes just letting your members know that supersaver fares exist can give a boost to your convention attendance. The Christian Booksellers Association, Colorado Springs, Colorado, normally schedules its conventions in some central U.S. city to accommodate its nationwide membership. Last year, however, it chose a West Coast site, and John T. Bass, CBA's executive vice president, was expecting a 10 to 15 percent drop in attendance because it was so far for some of his members to travel. It didn't turn out that way.

"Because we alerted people to the availability of regular supersaver fares in our convention mailings and because our members were interested in what we were putting on, we were able to overcome the noncentral location. Instead of dropping, our registration actually rose over the previous year's figures," he says.

Don't promote any one particular regular or special fare, though, unless you have an agreement with the airline, because frequently it can be a case of here today and gone tomorrow. Such was the case with one airline's convention fare, which was widely touted by the carrier and mentioned in several trade magazines. However, it was abruptly pulled by the airline for what the airline promises to be a new and better arrangement that will be announced soon. The elimination of the filing requirements on tariffs and the tremendous competition among carriers have caused some fares to be classified almost as trade secrets.

By any measure, the range of fares is mind boggling. New fares and gimmicks are coming out every day. But take heart. The airlines are increasingly going after the association market, and as a result, they try to keep you informed of new savings opportunities for your members.

One such example is AIR CAL, which recently came out with a "ZoneAir passbook" of discounted tickets. Targeted at the general business traveler, they are available either from travel agents or from the carrier in lots of 10 and 50 tickets that are good throughout the system for an unlimited period of time. AIR CAL, which serves Washington, Oregon, California and Arizona, has been divided into four zones for the purpose of this fare. The number of tickets you must use per trip varies from one to two-and-a-half depending upon the number of zones you travel.

To encourage associations to use ZoneAir, the carrier suggests that local society members or association chapters, or in some cases the main organization itself, band together to purchase books of these passes. This will result in greater savings for members because the larger the volume, the higher the discount -- which ranges from 10 to 24 percent off regular fares. This type of bulk purchase is possible because these passes are completely transferable. The only restriction is that they are nonrefundable.

A number of other airlines have pass arrangements as well, usually based upon a specific time period. Some have a limitation on the number of cities; some don't. Most passes must be purchased in advance.

Check around; you may find that this type of fare would mean big savings to some of your members, particularly members of your board of directors, who tend to travel on association business more frequently than the members at large.

NEGOTIATING YOUR OWN FARES

Negotiating special air fares for your meeting or convention can be done through travel agents or directly with the airlines. More and more bargains are available for those who take the trouble to seek them out.

Some association executives and convention planners have neither the time nor the inclination to handle the travel arrangements for their membership, even though they realize cheaper transportation costs usually mean higher registration figures. For these people, using a travel agent is the answer.

Dr. Ronald Santana, president of the Association of Retail Travel Agents in Croton-on-Hudson, New York, outlines the benefits of working with an agency. "Travel agents work with a wide range of carriers and can offer less biased service than a single airline. An agent can do anything an airline can do, insofar as travel arrangements and ticketing are concerned, and can do it better."

If you do use a travel agency, however, pick one that has experience in dealing with meetings and conventions and with packaging deals with airlines. The National Office Products Association used such an agency to make travel arrangements for its 1981 Chicago convention, explains Martha Krafton, director of conventions and exhibits. "They looked at our registration figures to determine how many people they thought we would bring into Chicago, and then they talked to various airlines to determine which could give us the best deal for that certain week.

"As part of the deal, the agency guaranteed the airline that it would write tickets for 900 people for our show from various parts of the United States. If we didn't meet that number, the agency was going to have to pay the airline $20 for each ticket short of the 900 figure. The agency itself took a chance on our show. It all turned out well, though, because they wrote about 1,800 tickets for the event."

Stuart Stafman, a travel agent with Conference Air services, Arlington, Virginia, explains how it works. "Essentially what we do is take an association's buying power, combined with several other client associations, and negotiate very much like we would for hotel rooms." His organization tells the airlines how many people it expects to ticket, from what general points, and on what dates, and then asks for a special fare break.

"There are two things we go after," continues Stafman. "The first thing we want is to get rid of all restrictions, so we have the capability to sell coach seats with no capacity control limitations. We eliminate the advance-purchase and minimum-stay provisions, and we don't have to deal with the so-called designated flights."

The second condition is that Convention Air Services writes all the tickets under this special fare. "If members want the special discount fares, they come to us. We are the only ones who have them. We set up a toll-free line that is advertised in the convention promotion mailings, and we write tickets up until the day before the convention. For last-minute sales, we take the members' credit card numbers and have a prepaid ticket waiting for them at the airport," he notes.

DIRECT NEGOTIATIONS

Some association executives prefer to negotiate directly with an airline. It's a practice that's been going on for a while, but only recently have the airlines pushed it openly. "The airlines are in the business of negotiating rates. If you go directly to the sales department of an airline you are going to get a better deal," notes Harold Graham, vice president, program planning, of the Travel Industry Association of America in Washington, D.C. Emphasizing that the opinions he voices are his own, based on more than 20 years of airline experience, and not those of TIAA, Graham adds: "Shop the airlines that have broad service within the area your meeting is going to be held, and concentrate on getting them to come up with a bid for the right to be able to go out to your members. Offer a discount for your members' exclusive use."

This is the way the National Electric Sign Association of Alexandria, Virginia, helps its members get to meetings and conventions, according to E.G. John Johnson, CAE, vice president, member services. "We try to pick the carrier that we believe is going to provide the best service for the majority of our members. This decision is usually based on routes. We look at where our meeting is to be held and where our members are coming from, and then approach the airline that offers the best service."

The airlines that Johnson has worked with have been willing to handle most of the travel promotion details. "They set up a special 800 number, usually a convention desk arrangement, and provide us with a brochure or flyer to enclose in our promotional mailing. We don't get involved with making individual reservations."

WHO WRITES THE TICKETS?

This type of arrangement may be changing, though, because deregulation is eventually expected to extend to the persons and agencies who write tickets as well. According to Harold Graham, the CAB is expected to issue a ruling sometime later this year that would remove the limitations on who can sell tickets. This could mean that almost anyone could write tickets under certain conditions -- even hotel bellmen.

Stuart Stafman also believes this change will occur. In fact, he makes sure his association customers are aware of this probable change. In addition, he provides them with computer printouts of their meeting and convention business that he handles. The list includes the member's name and ticket number, which verifies that a ticket was produced. He also provides a full travel itinerary and breaks down what airline got what percentage of the fare and so forth.

This can be a powerful negotiating tool to use in getting special fare breaks for your next convention. You have numbers you can prove -- buying power set out in black and white.

When asked why he is, in effect, encouraging his clients to handle travel arrangements themselves, Stafman explains: It's going to happen anyway. If the CAB does away with the exclusivity rule (which determines who is allowed to write tickets), then anybody will be able to write tickets, and there are going to be a lot of unemployed travel agents. Small associations that don't have much buying power will probably still use an agency, but the larger ones will more than likely handle all the arrangements themselves. We don't know what's going to happen when this situation breaks open, but we're telling our clients up front what's likely to happen."

As one travel industry official put it: "It's a buyer's market right now if you have any volume at all. Groups of 100 and 200 can expect a discount of 200 percent off regular fares with no restrictions attached."

For those with more members traveling, the discounts really jump. Stafman says when his agency is negotiating for a group, it starts from the lowest readily available fare. "We used to use the supersaver fare, but we don't even do that any more because airlines now have even lower fares. Nobody should negotiate from the coach fare."

If this seems excessive, consider the promotional fares that airlines have recently offered -- ranging from the 50 cents return flight to the offer to better any price of a bus ticket to the same destination. Some of these offers are good for a short period, but others have longer life spans. If the airline is willing to promote such low individual fares, consider how much more willing it will be to negotiate with your association, which offers high volume and the possibility of steady cash flow.

Negotiating away the restrictions is equally important, according to Johnson. "The airline industry is certainly doing strange things with respect to fares. You can buy 'el cheapo' fares on a couple of deals they've offered lately, but these tickets are nonrefundable. And in the business world, when you buy a nonrefundable airline ticket you're really shooting craps."

Where all this chaos and confusion in airline fare systems will lead, no one really knows. But, according to TIAA's Graham, "The carriers that can operate at the lowest break-even load factor are going to be the airlines that will survive. They can make money at levels where others can't."

While the airlines attempt to find out exactly who these winners will be, you can't afford to miss the opportunity to use the fare wars to help your members get to meetings and conventions in a more economical way.

OFF THEY GO INTO THE WILD BLUE YONDER: A DIRECTOR'S GUIDE TO ALUMNI TRAVEL PROGRAMS

Frank Jones
Executive Secretary
Indiana University
Alumni Association

In July 1971, almost 400 Indiana University alumni set off for Greece on three chartered Boeing 707s. Their odyssey included a 12-day tour of the country and a cruise to five of the famous Greek islands. In several ways, this tour was the high water mark of IU's 20-year-old travel program. It succeeded because it was inexpensive, attractive, and educational. We were not yet battling inflation. In fact, tour members had to do battle with an onslaught of "carry-on" gifts on the plane ride home.

Are those happy days gone forever?

Most alumni directors treasure their alumni travel memories of 10 years ago. Then we could charter an aircraft at a price that saved money on the per seat cost and pass the savings along to the alumni traveler. We can't do that anymore. Charters are difficult to locate, and when we do find one, it costs as much as or more per seat than regular scheduled aircraft.

These days, even small groups of touring alumni are subject to erratic overseas airline schedules due to domestic and overseas flight cutbacks.

The cost of travel has tripled, with airfares and hotel rates leading the way. A cup of coffee purchased at a fine hotel anywhere in the world can now cost $2.50 or more. In effect, these steeply rising costs definitely threaten the existence of alumni touring programs.

The cost of selling the tours also has risen astronomically with the increase in third class postal rates. Uncle Sam, through his internal revenue hierarchy, has taken exception to our claim that alumni tours are a vital part of any alumni relations program. He suggests instead that the travel program is unrelated to our educational mission and therefore subject to taxation. He has castigated several alumni associations for allowing nonalumni to join the tour. Even further, the U.S. Postal Service, in cahoots with the Internal Revenue Service, has threatened to cancel the nonprofit mailing permits of several alumni organizations when those mailings appear to come from tour companies.

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Overall, the product costs of alumni travel have increased more than 300 percent in the last 10 years. With these economic difficulties, many alumni directors may wonder: Are they worth it all? With this question in mind, I did an informal study of our travel program participants. My study repeated in part one that the University of Michigan conducted in 1969 to determine the giving records of its alumni travelers.

My research shows that two-thirds of the persons who have traveled on IU tours in the past eight years are donors to the Indiana University Foundation. In addition, over 90 percent of our travelers are paying members of the IU Alumni Association. These figures support one primary reason we have a travel program: It builds a relationship with alumni who are good prospects for the university's fund-raising program.

KEEPING COSTS DOWN

How do you trim your travel programs without reducing participation? Our office has taken several cost-cutting measures that have not hurt the effectivess of our program. You might try these approaches:

1. Cater to smaller groups and offer more tours. Small-group travel permits more flexibility in group itineraries.

2. Combine tours. You may qualify for special discounts if you bring together groups of alumni from several universities. For example, you can rent hotels in Switzerland or charter super liners in the Caribbean. Alumni officers used to avoid sharing their tours with other associations, yet today they agree that their alumni enjoy meeting and traveling with graduates of the other schools.

3. Capitalize on the American dollar. The dollar is worth more in some parts of the world (Canada and England, for example) than it is in other countries. Therefore, you should organize tours that capitalize on the dollar's value, not its devaluation. This requires more work than it did in the past.

4. Liberate your travelers. Allow more individual local options during tours. In the early 1970s the expression, "If it's Tuesday, this must be Belgium," seemed to describe many alumni tours. Seasoned travelers enjoy the fact that our tours now allow them time to "do their own thing" in the countries they are visiting. Loosen up your tour itineraries to allow this freedom.

5. Refine your marketing skills. In the past few years, alumni programmers have learned a great deal about how to market their tour programs. They are designing their direct mail pieces more effectively. They are selecting groups of prospective tour members more logically. And they are sending out the mailings

early enough to allow the traveler to make adequate plans. Most university alumni organizations now announce their upcoming tour program 12 months in advance, something that was unheard of 10 years ago.

6. Improve your record-keeping system and lower your postage costs. Draw up a profile of the kinds of people who are likely to go on your tours and use this profile to determine who receives your mailing. For instance, does it make sense to send a tour promotion to an alumnus who is in the tour business, or to a shut-in, or to a tax accountant in the spring, or to a school teacher in the fall? Mail to more affluent groups and limit the number of letters you send to recent graduates. Today, with the help of computers, it is less expensive to pull out certain categories of graduates than it is to mail to everyone.

7. Prepare your tour hosts better. Hosting a tour is a very tough job. The university has a lot to lose if the tour host does not serve competently. Train your hosts to be good representatives of your institution before and after as well as for the duration of the tour.

8. Select your tours carefully. At Indiana University, we know that over 60 percent of our tour members have traveled with us previously. Our challenge is to continue to offer new and interesting trips while at the same time repeating tours that have proven successful. The alumni staff should have a good deal of influence in the selection of tour offerings.

For example, IU alumni seem to have only minimal interest in traveling to Russia or South America. I cannot explain why, but I know it is the case. So we offer few trips to these places.

KEEPING TOURS EDUCATIONAL

The IRS asks: What is there about touring that is educational? But I respond by asking the question in reverse: What is there about touring that is not educational? An organized tour presents the perfect opportunity to give alumni an educational experience. There are two excellent ways of doing this: (1) involve faculty who know about the places to be visited on the tour; and (2) locate your graduates or former students who live in the areas your tour will visit. Few tours abroad offer this type of contact experience to tour members. Keep in mind that you must begin to negotiate with your foreign alumni at least three months before the tour takes off.

To make sure that your trips maintain their educational integrity, keep records of the local commercial tours your members enjoyed on previous visits to scheduled stops. In many cases, local agencies, working with the agency we've hired to handle the tour, sell city tours to our travelers. Since we have kept a record of local tour evaluations submitted by tour hosts, we know which local tours to take and which to avoid.

Many of the tour agencies we deal with these days disclaim any responsibility for local tours offered to tour participants. This is especially true on islands in the Caribbean. By asking tour hosts to keep a written record on these tours, including reports from persons taking these local tours, we are in a better position to make suggestions.

YOUR HOSTS GIVE THE MOST

It is sad that today many alumni tours travel without tour hosts. The success of these tours often depends upon the travel directors that the tour companies furnish. If we feel that all of our program should benefit our universities, then we must try to send a faculty member or university officer as a host for the group.

Often, if the group traveling is small, you can't afford to send a host. To overcome this disadvantage, you can appoint a paying participant as an ambassador to look after the interests of the university. He or she greets foreign alumni, assists with the health problems that arise on every tour, and helps ensure that our graduates become acquainted with each other during the trip.

Many alumni tour sponsors have developed manuals for tour hosts. These give general guidance and make the institutional representative aware of his or her responsibilities. After all, there is a great deal of difference between being acquainted with a country and being prepared to lead a group to that country. Professional tour directors have different priorities from those of the tour hosts. Obviously, a close working arrangement between the two is essential.

YOUNG ALUMNI TRAVEL

Tours for young graduates require budget consciousness in the planning. One plan that attracts younger alumni is the small ski tour, preferably by bus. Athletic events scheduled in interesting cities across the country can be inexpensive, especially if you plan the tour without using a travel agent. To do this, you must know how to handle baggage and airport transfers, and how to deal with hotels on the logistics of moving groups in and out.

Sometimes we forget that it usually has taken a number of years to build a successful program. The alumni themselves are our best salespersons when it comes to involving more people. This is especially true for alumni under the age of 35. Tours for young graduates run without a tour agent. They present a financial risk, however. Be prepared to plan carefully.

Will we be ready with new ideas when the cost of travel comes down? It is imperative that we keep abreast of the happenings in the travel industry. When prices do come down, we must be ready to involve our young graduates in our tours.

Our tour programs have outlived by several years the red tape of the Civil Aeronautics Board regulations. We have survived federal deregulation of the airlines. We've weathered controllers' and other strikes. Now, still alive and kicking, we're waiting with millions of tourists for the economic situation to improve. Who knows? Soon it may be possible to plant on the moon that aging IU banner we habitually take with us around the world.

ADD MORE EDUCATION TO YOUR TRAVEL PROGRAM

Stephen L. Barrett
Executive Director, Alumni Association
Brigham Young University

If it works, popular wisdom counsels, leave it alone. Alumni group travel programs don't merely work -- they work well. They meet the goals of the alumni associations that sponsor them; they satisfy alumni. So why change?

Admittedly a last-minute flight cancellation or a theft of a traveler's wallet has occasionally marred a trip abroad, but such troubles are happily rare. Alumni enjoy the ease of prearranged travel with a congenial group at modest cost. Introduction of an educational element complicates arrangements and adds to the effort and expense. Why bother?

Over the past 10 years I've been involved in 30 alumni travel programs, both educational and noneducational. I've given the question much thought and have concluded that educational travel belongs in the alumni program. Here are my reasons:

1. IRS charges that fun-filled weeks in Acapulco do not measure up to the educational purposes of your institution. As a result, a number of tours are now classed, for tax purposes, as unrelated business operations. That reason alone may suffice to encourage you to add more educational aspects. But there are additional, if less obvious, reasons.

2. An educational emphasis helps sell the tour. In the past three years, our association has operated an Eastern Mediterranean cruise tour for 601, 450, and 465 people respectively. These tours have included at least two professors (sometimes four) who gave up to 16 shipboard lectures in the two-week cruise, most of them repeated twice to accommodate the participants.

Our alumni return from these trips brimming with interest in and enthusiasm for the Middle East. Their feelings are contagious, and we have not yet really had to sell the next tour. So far, the Mediterranean cruises have been full each year before the brochures come off the press.

3. Alumni educational travel costs the institution nothing. The participants cover all costs.

4. Educational tours help build the image of your institution. They demonstrate that it is serious about the importance of education for all ages. Furthermore, you may be

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able to offer the option of transferable credit because university professors provide the instruction. This credit means a lot to many participants.

5. A well-designed alumni educational tour rounds out an already good alumni program with a high quality activity that almost all alumni see as desirable. An experience that combines pleasure and learning engenders strong positive feelings toward both the university and the association.

Perhaps this actual experience from one of our tours can best illustrate the value I see in such programs.

High in the Bolivian Andes, a dirt mound covers the remains of the ancient city of Tiahuanaco. It is 20 miles from a large lake. Archeologists have cut an opening on one side of the mound, and in this opening stand two BYU alumni: a middle-aged car dealer from Detroit and a great-grandmother from Salt Lake City. Exploring with their hands, they feel the water-worn, rounded stonework on the lower levels and then the sharp-edged, square-cut stones above. Their eyes sparkle.

They have "discovered" the evidence for the hypothesis the professor has just advanced. In 2500 B.C. the lake was there at Tiahuanaco, which was once a port city on a large inland sea.

The car dealer returned to Detroit and later earned an additional degree in archaeology. He contributed to research in the field. The old woman instilled the joy and excitement of learning in her grandchildren and great-grandchildren.

Aren't these reasons enough to add education to your travel program?

GO NOW, GIVE LATER

Michael Ellerbrock
Instructor, Department of Recreation
and Park Administration
Clemson University

True or false: Alumni who take part in alumni association tours increase their annual fund contributions more than do similar alumni who don't go on such tours. Based on experience here at Clemson, the answer is true.

To find that answer, though, required some detailed research. We took a close look at participants in three Clemson Alumni Association trips abroad. We compared the "before tour" and "after tour" giving records of these alumni and found a significant increase.

For comparative purposes, we selected a control group of 200 non-touring alumni. Although we found that their unrestricted gifts to Clemson had increased, too, it was by not nearly as much.

From the Clemson computer, we got the annual giving record for each tourgoer. We found that 81 of the 87 traveling alumni were annual or semi-annual givers. Because of this, we selected as a control group 200 alumni, 180 of whom were annual or semi-annual givers. None had participated in alumni tours.

We asked the computer for information on tourgoers' giving for several years before the tour and for two or three years after (see chart on following page). We did the same for members of the stay-at-home group. So inflation wouldn't cloud the picture, we used constant dollar comparisons. (We used the Consumer Price Index to make this adjustment.)

You'll see from the chart that the increase in tourgoers' average unrestricted gift in constant dollars was 130 percent for the tour to London, 83 percent for Spain, and 19 percent for Amsterdam. The average increase in constant dollars for all tourgoers was 45 percent.

Meanwhile, we found that the average gift of the control group had increased in a comparable period from $8.08 to $10.18 (constant dollars), an increase of 26 percent.

In short, the average tourgoers' giving increased almost twice as much as did the giving of those who didn't participate (45 compared to 26 percent).

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We don't consider our research the "last word." For example, we didn't pair the control group to the touring group by age. We'd like to see more research. For example, right here at Clemson we hope to explore why there's such a great variation (19 percent to 130 percent) in the percentage of increase, depending on the particular tour. Did something "turn off" the Amsterdam participants? Or was it less likely that they would increase their giving level because it was already high?

If you've done research on the relationship of tourgoing to giving, let us hear from you. Together we may establish that there's a lot more payoff to alumni tours than good will alone.

HOW ALUMNI TOURS AFFECT UNRESTRICTED GIVING

Group	Before Tour (average gift in constant dollars)	After Tour (average gift in constant dollars)	Percent Increase
Tour to London (41 alumni)	$13.90	$32.01	130
Tour to Spain (26 alumni)	$23.18	$42.33	83
Tour to Amsterdam (20 alumni)	$55.67	$66.43	19
All three tours (87 alumni)	$26.05	$37.85	45
Control group (200 alumni -- no tour)	$ 8.08	$10.18	26

(Note: For the London trip, "before tour" was defined as the years 1970 through 1975 and "after tour" as 1976 and 1977. For the other two tours and for the control group, "before tour" was the years 1970 through 1975 and "after tour" was the years 1975 through 1977.)

ALUMNI SERENADE: A MEDLEY OF 17 OFF-CAMPUS ACTIVITIES TO HAVE THEM SINGING YOUR SCHOOL'S PRAISES.

Peter Cummings
Former Editorial Assistant
CASE CURRENTS

Do your alumni think you're the top? If they don't think you're the Tower of Pisa, try taking them there. They'll soon be as happy as the Mona Lisa.

Whether you take alumni on a white-water raft trip or treat them to a concert of Strauss waltzes, you can woo them with interesting off-campus activities. Here are 17 ideas:

TAKE ME HOME, COUNTRY ROADS

In Los Angeles, Carleton College alumni recently enjoyed a gala performance of bluegrass music by the McLain Family Band, including works by Carleton's composer-in-residence, Phillip Rhodes. Beforehand, alumni and parents attended a dinner and lecture/demonstration with the composer and band. And speaking of parties, last holiday season Carleton invited alumni, parents, and current prospective students to a potluck affair in Washington, DC. The party made students feel they were a part of the association from the beginning, according to Director of Alumni Affairs Richard E. Jorgensen.

WATCHING THE WORLD GO BY

Southern Methodist University keeps its alumni on the move. It took alumni on a two-mile "Nile River Adventure." The trip included four days in Cairo and a riverboat trip down the Nile, with stops at the tombs of kings and other Egyptian monuments. The group also visited Jerusalem, Bethlehem, Nazareth, the Sea of Galilee, and Tel Aviv. This year SMU will offer a Caribbean cruise, including visits to Puerto Rico, the French and Dutch West Indies, Venezuela, and the Virgin Islands.

MOUNTAIN GREENERY

Lehigh University offered a week-long "alumni summer college" at Wells College in upstate New York. The program included courses in China, the use of color in art, and "passages" in adult lives. The $320 fee ($240 for each child) included the courses, meals, lodging, reception, picnic, tennis, golf, swimming, and a recreational program for the kids.

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RED SAILS IN THE SUNSET

The University of Illinois Alumni Association sponsors a day-long boat tour of the Chicago Waterways System. The tour guide, a geography professor, introduces alumni to "the social, political, and economic consequences of Chicago's geographical location." The event is always a sell-out, according to Susan L. Arngerg, vice president of the alumni association at UI/Chicago Circle. A $25 fee covers the tour, coffee, sweet rolls, and a box lunch. For land-loving alumni, UI offers a guided bus tour of Chicago for $16. And for high-flying graduates, UI offers a two-week trip to Norway, Sweden, and Denmark for $3,150.

CLOUDS

In March 1982, 35 Dartmouth College graduates and spouses set sail for the Caribbean aboard the S.Y. Sea Cloud, a tall ship built in 1932 by E. F. Hutton for Marjorie Merriweather Post. The Sea Cloud sailed through the Windward and Leeward Islands and stopped at such places as Antigua, Iles des Saintes, and St. Lucia. While on board, English professors James M. Cox and Noel Perin lectured on the sea novels of Melville, Dana, and Forester. The price of the cruise (one of four Dartmouth Alumni Colleges Abroad trips last year) included the academic program (books with faculty guides for advance reading and the lectures on board), round-trip transportation, and two nights' lodging in Antigua.

GRAND CANYON SUITE

Arizona State University took two groups of alumni on week-long boat trips down the Colorado River, which passes through the Grand Canyon. ASU president Russ Nelson went with one group, and football coach Darryl Rogers accompanied another. The excursion cost $868. For alumni desiring shorter trips, ASU also sponsored one-to-three-day trips to other Arizona attractions: Canyon de Chelly, Castle Hot Springs, Havasupai Canyon, and a copper mine.

CALIFORNIA DREAMIN'

Pomona College alumni attended a series of five plays held at small theatres in southern California. The participants kicked off the series with an on-campus dinner and talk by the college theatre department chair. A discussion with actors and directors followed each play's performance.

GOTTA TRAVEL ON

Have your professors and president go on the road to talk to alumni about cultural offerings in their hometowns. Boston University President John R. Silber recently traveled to New York City to join 500 New York-area alumni at a special reception at the Guggenheim Museum of Art. Thomas Messer, a university alumnus and director of the Guggenheim, arranged for a special showing of the exhibit, "Kandinsky in Munich: 1896-1914." Alumni and their guests listened to Messer, viewed the exhibition, nibbled hors de'oeuvres, and got a kick from champagne.

THE GANG'S ALL HERE

Indiana University's alumni family camps help fill the need for alumni/children activities. In 1982, the alumni association's Camp Brosius at Elkhart Lake in Wisconsin celebrated its seventh anniversary. Over 800 persons attended eight week-long programs of sports, outdoor recreation, and continuing education. Another alumni family camp at Lake Monroe in Indiana was completed in August 1982. According to IU's Recognition Entry (it won an Exceptional Achievement Award in the 1982 Recognition Program), alumni giving for the camps was "enthusiastic and generous, indicating strong support."

ANYTHING GOES

Georgetown University's Alumni/Parents Program coordinates trips all over the world, including visits to Ireland, Spain, Vancouver, and the Canadian Rockies; a cruise on Western Europe's waterways; and a Caribbean cruise. GU's alumni college also sponsored a "learning vacation." Taught by university faculty, courses included "International Human Rights," "Foreign Policy Challenges in the 1980s," and "Medicine in the Humanities." Practical courses like CPR and estate planning were also included.

CATCH A FALLING STAR

One way the University of Iowa Alumni Association honored its achievers was to sponsor a reception for alumni and friends at the Kennedy Center in Washington, DC, where the university's first-place American College Theatre Festival winner, "Distilling Spirits," was performing. And for the science-oriented, UIAA sponsored a reception, program, and dinner for alumni at the Adler Planetarium in Chicago. The function was held in conjunction with the installation of the Planetarium's new laser light system, developed by UI professor Lowell Cross.

DAY TRIPPER

From time to time Virginia colleges combine resources by holding joint alumni events in major cities across the country. Recently, Old Dominion University in Norfolk, organized an "Old Dominion Day" (Old Dominion is also the state's nickname) in Atlanta. The alumni of 15 Virginia schools participated in the program for which ODU handled reservations.

THESE BOOTS ARE MADE FOR WALKIN'

Brown University's "continuing college" for alumni could turn up anywhere. The university sends faculty members all over the country. In 1981-82, the off-campus seminar list included "Alexander the Great" (Boston and San Francisco), "As You Like It" (San Diego), "George Washington" (Washington, DC), "Chicago Neighborhoods" (Chicago), "Politics of Love" (Seattle and Portland), and "Oriental Visions" (Westchester, New York/Connecticut). Because the continuing college is designed to break even, most sessions occur in areas with high concentration of Brown alumni (Boston, for example). Brown's total alumni program won a 1982 Recognition Program Award.

SCHOOL DAYS, SCHOOL DAYS

Ohio Wesleyan University sponsors a series of "learning experiences" for alumni taught by OWU faculty, alumni, and other experts. At a lecture on "Reaganomics: Pros and Cons," a trustee, a professor, and two alumni discussed supply-side economics, tax cuts, and their effects on investment and charitable giving. A season on "Images of Health" offered guidelines for health living, facts about fads, and advice on "sifting truth from mere hokum."

TO EVERYTHING THERE IS A SEASON

Brigham Young University takes advantage of its religious heritage in its alumni programs. A lecture on "Research and Archaeology at Adamondi-Ahman," which considered a BYU professor's work with early Latter-day Saint history, was held near the site. Another session on medical ethics "dealt with advancing technologies that some members of the church felt confronted our theology," said Richard D. Cox, coordinator of off-campus programs. BYU also conducted a two-part "marriage enrichment series" featuring a Friday night fireside program and an all-day workshop. The fireside program drew almost 200 people, and the workshop attracted 56 couples. A BYU professor and his wife conducted the sessions.

PENNIES FROM HEAVEN

What will I do with my money? To help its alumni solve their money dilemma, Rutgers University sponsored a faculty lecture program on personal finance. Rutgers conducted the session in several locations throughout New Jersey, where most alumni live. To keep costs down to $2, the university sought out facilities that were accessible and free of charge. One meeting was held in the multi-media room of a major corporation, and another in the auditorium of a labor union building.

DANKE SCHOEN

Lehigh University's Alumni Association, in conjunction with a travel company, flew a group of alumni to Germany for two weeks last August. After three nights in Munich, alumni took a six-day cruise down the Main River aboard the Dutch vessel M.S. Kroes. On board there were lectures on the history, culture, and peoples of the Main Passage area. The alumni group's last port of call was the city of Mainz. The cost: $1,899 per person from New York.

CLAP YOUR HANDS

So there you have it: Clap your hands for your alumni, tell them, "I've got a crush on you," and they'll soon be singing love songs to their alma mater.

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CALLING ADVENTUROUS ALUMNI TO WHITE WATER, BLACK SEA

Nancy Harper
Former Assistant Editor
CASE CURRENTS

"As a member of an escorted tour, you don't even have to know the Matterhorn isn't a tuba," says Temple Fielding in his 1963 Fielding's Guide to Europe.

Those days have passed leaving us with embarrassing memories of "it's Tuesday so this must be Belgium," and of Ugly American tourists who know nothing of what they see.

Today, the guided tourist more likely follows Samual Johnson's advice:" . . . in travelling, a man must carry knowledge with him if he would bring home knowledge."

Whether it's called alumni college, continuing education, or a travel seminar, the educational tour is becoming an important function of alumni associations. Here are a few to whet your appetite.

RECHARGING BATTERIES

To the Lands of Scythians goes the Harvard Alumni College at Sea. From Athens the group will cruise through the Dardanelles to Varna, Odessa, Talta, and Sochi on the Black Sea. These ports provide vacationing Europeans with fun and sun. The Harvard alumni group this summer will enjoy both, but with an added emphasis -- ancient art and archaeology.

The 50-60 participants in Harvard's "Escape to the Lands of the Scythians" will study under the guidance of two distinguished teachers.

The group travels by first-class cruise ship. Elizabeth E. Kimball of the Associated Harvard Alumni says, "The college promises to be mind-stretching without being tense (no quizzes, credits, or grades), providing an enjoyable way to recharge our intellectual batteries in combination with social comforts ..."

To make it all easier, the promotional materials include a reading list/order form. Suggested books may be ordered from Hardard's COOP

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WILD RIVER RAPID SHOOTERS

So you don't have lectures, seminars, and reading lists. As anyone who has done it can tell you, wild river raft trips are educational. Here are two schools that offer this excitement to their alumni.

Idaho State University alumni have preference on registration for the Salmon River float trip. Scheduled for August 15-20, the trip will cover four gorges in the seldom-traveled Lower Gorge of the Salmon.

White water float trips seem natural for institutions in Idaho, but somewhat surprising for Coe College in Iowa. Coe's alumni see nothing unusual about the idea: The proposed Yampa-Green River trip has had "excellent" response.

Both the ISU and Coe College groups use experienced and licensed outfitters and charge $150 per person for the trip.

THE EDIBLE PLATTE RIVER

No it doesn't mean that you can eat the Platte River. It does mean that the University of Nebraska alumni group learns about, searches for, finds, and eats wild foods growing along that "mile-wide, inch-deep" waterway. They travel, according to Carole Reno, director of alumni services, in canoes provided by an outfitter.

"It's a frontier trip," Reno says, "complete with an expert in foraging, an historian, and an entomologist -- all from the university."

The Edible Platte trip is similar to a canoe venture on the Niobrara River sponsored by the alumni association. Both extend from Friday night to Sunday afternoon, and both include courses in canoe safety and water courtesy.

The Niobrara trip, in northern Nebraska, emphasizes the folklore of the High Plains. It is led by an English professor who uses his banjo when he talks and sings about prairie life.

"It takes a different eye to see the beauty in flat lands," Reno says. "But through the tales of the folklorist, and with the help of the entomologist, alumni travelers discover the difference."

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OBERLIN'S IRELAND

It involves a little extra work for the alumni association staff, but Oberlin College's educational tour of Ireland is worth the effort, according to Jack Purvis, director.

The staff begins with an agency tour and personalizes it for their own institution by building in an educational dimension -- an Oberlin sociologist and anthropologist. A list of suggested readings prepares alumni.

The 57 participants in the latest Ireland trip enjoyed visits to country fairs and theaters. They met with Irish government leaders and visited the Waterford Crystal factory.

DISNEY AND THE MIDDLE AGES

Princeton's "Uncommon School" for alumni offers triple benefits: sunshine in early March, a comprehensive study of the Middle Ages, and a trip to Florida. What better way to beat the winter blahs?

Three Princeton professors led 17 different seminars and lectures during the three-day alumni college program. The lectures and three full-length movies covered medieval art, government, religion, science, and education. This year, 82 "intellectually stimulating and receptive" alumni participated, according to Dorothy L. Flohr of the Alumni Council.

The seminar schedule left little time for recreation, Flohr said. But for the off-hours, nearby Orlando and Disney World proved attractive. The hotel provided child care and recreational facilities.

The Alumni College Florida project is one of many sponsored by Princeton within the United States. This summer, the university plans the first such tour outside the country -- in France.

"An Old Civilization in a Modern World" is the title of the 11-day study of Normandy. The 50 participants will visit offices, factories, political centers, law courts, churches, and museums in Rouen.

NAVAJO LAND IN TENTS

"Did you really sleep in tents?" we asked, after reading the promotional literature for the Stanford Alumni Association's Hopi-Navajo Expedition.

"Yes," was the reply, "though some people just slept in the dirt." According to Alice Coogan, administrative assistant, Travel/Study Programs, "the tents came in handy for warmth and privacy. One morning everyone woke up to find an inch of snow on their sleeping bags!"

Peter Voll, director of the program, led the 16 Stanford alumni in maxi-wagons through the northern Arizona Indian country. They visited the Wupatki and Anasazi ruins, Navajo National Monument, and the Painted Desert. An outfitter cooked, guided, and drove the group, and an anthropologist from the University of Arizona provided expert commentary.

One highlight of the trip was the opportunity to see the clan dances on the Hopi mesas -- something outsiders rarely see.

Another kind of highlight, according to Coogan, was a horseback ride to the Keet Seel ruins. "Usually a pleasure ride," she said, "it was something of a survival test for our groups as we were caught in a fierce dust storm, the likes of which our Navajo guides had not seen for 20 years."

ENGLAND ON FOOT

Have you ever wondered how the average British university student lives? A group of Agnes Scott College alumnae will know after their trip this summer. For three weeks, they will stay in university dormitories all over England and Scotland.

During the days, they will walk -- in Bourton-on-the-water, Morton-on-the-marsh, and Stow-on-the-wold, among other places. Michael Brown, chairman of the ASC history department and a native of England, leads the group. He also handles housing arrangements.

Each registrant receives in advance a two-page reading list upon which Brown will base his daily lectures. The list covers everything from Trevelyan's History of England and Churchill's History of the English Speaking People to Jenkins' Elizabeth the Great.

TRAVEL WITH YOUR COLLEAGUES

By combining exciting travel with high-quality professional seminars, you offer an added service to your alumni travel program, according to Robert E. Shackleton, director of alumni affairs at Florida State University.

Shackleton, formerly with Michigan State University's alumni association, has wide experience with educational tours for alumni groups.

He believes that a successful tour depends on these ingredients: an attractive destination; a reasonably priced total package; a single, rather than move-around, destination; a one-week limit; and use of a hotel that provides facilities for seminar sessions.

A successful example of the professional tour was held for the MSU College of Veterinary Medicine Alumni Association. The 51 participants spent a week in Bermuda.

Daily seminars were arranged by the associate dean of the College of Veterinary Medicine. The seminar faculty included two MSU professors and two prominent alumni practitioners.

While the seminar schedule permitted plenty of free time for leisure, seminars were of such value that they often continued long past the scheduled closing times. Five veterinarians living in Bermuda joined the group, after having worked out a rotation system to leave one on call at all times.

Participants in the MSU seminars received certificates of participation. Shackleton plans to go a step farther after the planned Florida State Alaskan cruise for business executives by awarding Continuing Education Units for successful participation.